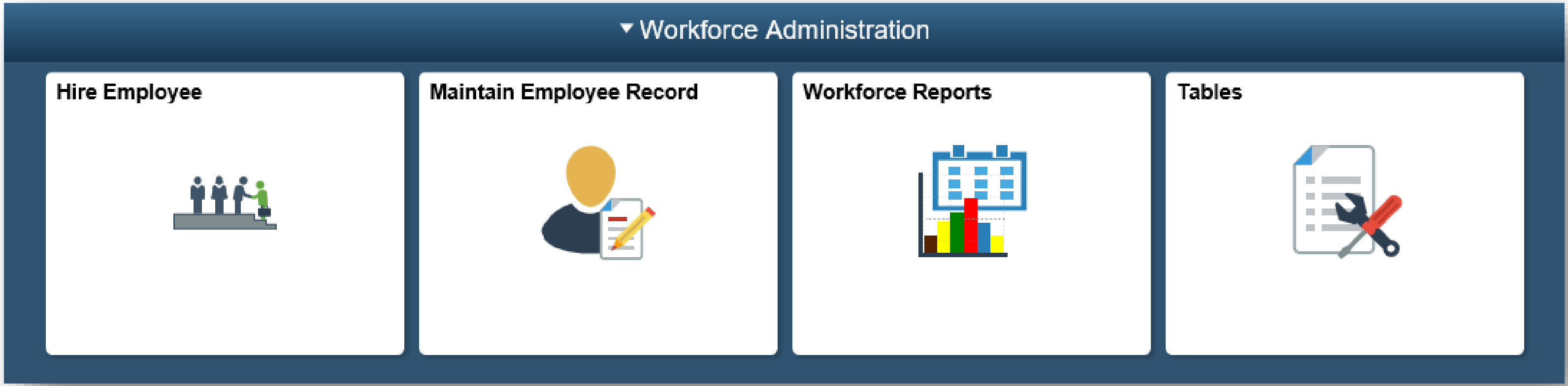
# Lesson 1: Overview of Workforce Administration

## Welcome




Lesson 1 provides an overview of Workforce Administration in SHARP, which is used to set up and maintain employee information. We will look at various pages and fields and describe how they are used.

In Lesson 2 we will discuss entering transactions, which include employee hires, promotions, transfers, terminations, salary increases, leaves of absence and employee personal information.

The data entered in Workforce Administration plays an important role in employee pay, how timesheets are created, longevity bonuses, and benefits deductions.

## Lesson Objectives

After completing this lesson, you will be able to:

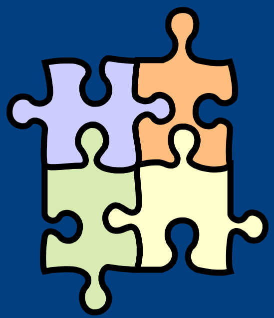
- Understand the relationship between an employee’s Position and Job Data
- Use Effective Dates to add and update employee information
- Identify Actions and Reasons used to enter job information for an employee
- Search for employees in SHARP

# Lesson 1: Overview of Workforce Administration

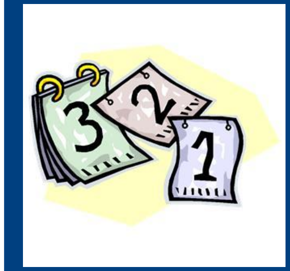
## Lesson Topics

In this lesson you will learn about the following topics.

Topic 1: Online Resources

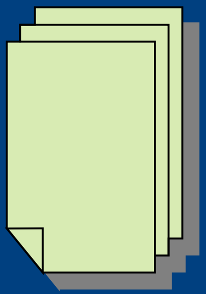


Topic 2: Relationships




Topic 3: Effective Dates

Topic 4: Add or View Data



Topic 5: Workforce Administration Pages

- **Online Resources**
  - **SHARP Customer Service Web Site**

https://www.admin.ks.gov/offices/personnel-services/sharp

- Action/Reason Guide
- Kansas Administrative Regulations
- Documents/Forms


Check out many more online resources on the web site. We'll discuss just a few here.

# Online Resources

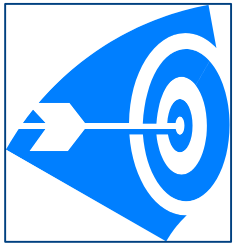
## Action/Reason Guide

- The **Action/Reason Guide** describes the Actions and Reasons to use when adding or updating positions or employee Job Data in SHARP. It explains when to use each one and references the appropriate Kansas Administrative Regulation (K.A.R.) when applicable.

Action/Reason Code User Guide

**Action/Reason Code User Guide**

| Action | Description | Reason | Description | Component | When to Use |
|---|---|---|---|---|---|
| CNV | Conversion | CNV | Conversion | Central Use only | Central use only. Used for changes associated with PeopleSoft upgrades. Agencies should not use this code. |
| DEM | Demotion | DCN | Conversion | Central Use only | Central use only. Used for changes associated with PeopleSoft upgrades. Agencies should not use this code. |
| DEM | Demotion | INV | Involuntary | Job Data | Move a classified employee from a position in one class to a position in another class having a lower pay grade for disciplinary purposes or other good cause. K.A.R. 1-6-27; K.S.A. 75-2949 |



Print the Guide so you can refer to it as you enter data in SHARP.

## Online Resources

### Kansas Administrative Regulations (K.A.R.)

- You can review the K.A.R.s to implement the state human resource program here: https://admin.ks.gov/offices/personnel-services/agency-information/regulations.
- Most of them apply only to classified employees unless otherwise specifically stated.
- Because the actions and reasons on the Action/Reason Guide are tied to the K.A.R.s, you should read the K.A.R. for more information and details. This can help you determine which action and reason is appropriate for your data entry.

# Lesson 1: Overview of Workforce Administration

## Online Resources

### SHARP Messages

- Join the SHARP Infolist to receive up-to-date information relating to SHARP transactions, procedures, and system status delivered to your email inbox.
- Sign up by going to https://www.admin.ks.gov/offices/personnel-services/sharp/infolist and click on the link to subscribe to the SHARP Infolist.
- An archive of messages is also available to review.

# Relationships

## How Recruiting Relates to Job Data

Often you will hire an applicant using the Recruiting process in SHARP. At other times, your applicant will not go through the recruiting process, such as unclassified direct appointments and new hires for classified temporary positions.

These applicants are hired in Workforce Administration pages and you are creating a Job Data record for that person. Some of the things that happen when you enter a new hire are:

- The name, address, and other demographic information you enter creates the Personal Information within Workforce Administration.
- The effective date of a new hire establishes the Service Date and Length of Service calculation on the Employment Data pages.
- The position number you enter pulls in the Job Title, Department, Location, Salary Plan, Employee Class, and much more from Position Data.

- Relationships
  - Between Positions and Employee Job Data

Changes made to Position Data may automatically update Job Data if the position is filled.

For example, if you enter a department change row in Position Data, SHARP inserts a row in Job Data with the same effective date and action/reason.

It is important to check employee Job Data after entering changes to the position. You'll need to manually add a row if Job Data didn't automatically update.

# Relationships

## Between Positions and Employee Job Data

Some of the common Position Change data entries that also insert a Job Data row if the position is filled are:

| Action | Reason | When to Use |
|---|---|---|
| Position Change | Percent/FTE Change | Change the FTE associated with the position, such as from 1.0 to .50 |
| Position Change | Funding Change | Update funding information |
| Position Change | Position Data Update | Use for all situations not covered by other available reason codes, such as changing the position to a new location code or new department |
| Position Change | Reports To Change | Use when only the Reports To number is changed |

- **Relationships**
  - **Between Positions and Employee Job Data**

Some Position Data changes also require you to enter additional information in Job Data.

For example, if you reallocate or change the job code for a filled position in Position Data, SHARP adds a corresponding row to Job Data. However, you must manually add another row in Job Data, using effective sequencing, to enter the employee's pay rate.

The action/reason entered on the Job Data row you add depends on the circumstances. For example, if the employee's position was reallocated to a higher pay grade and the employee stays on the same step the action is 'Promotion' and the reason is 'Promotion New Position/Class.'

In Lesson 2 you'll learn more about entering rows in Job Data.

# Relationships

## Between Positions and Employee Job Data

The position reallocation action/reasons below drop a corresponding row into an incumbent's Job Data. You must manually add another row in Job Data, using effective sequencing, and enter the appropriate action/reason.

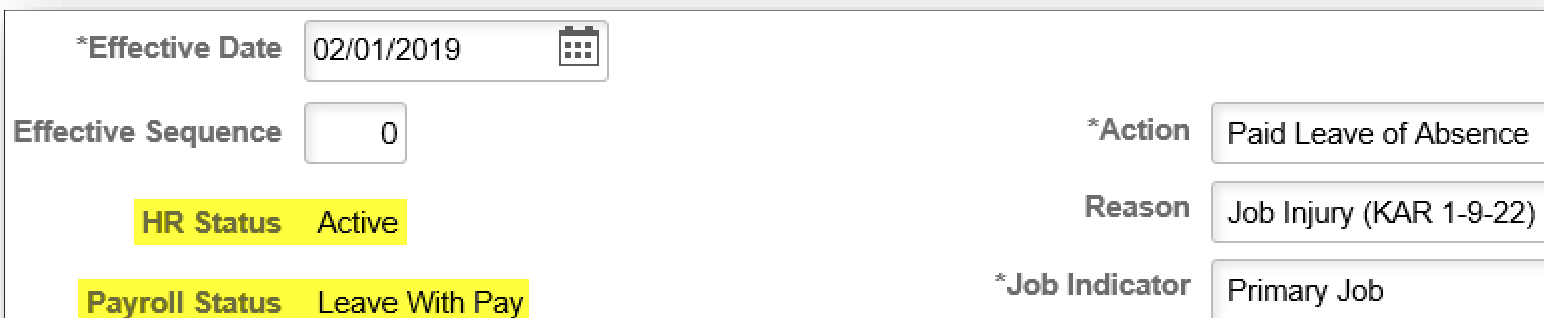
| Action | Reason | When to Use |
| --- | --- | --- |
| Position Change | Change in Duties | Assign a position to a different job classification due to a change in duties. K.A.R. 1-4-7 |
| Position Change | Reallocation – Position Review | Assign position to a different job classification and new pay grade as the result of a position review conducted by the agency or OPS at the request of the employee or agency. K.A.R. 1-4-7 |
| Position Change | Reallocation Per Ad Hoc Study | Assign position to a new job code and classification when the existing classification is abolished as the result of an ad hoc classification study conducted by OPS pursuant to K.S.A. 75-2938. |
| Position Change | Recruitment Purposes | Assign a position to a different job class and new pay grade for recruiting purposes due to a lack of qualified candidates and no training class exists. K.A.R. 1-4-7 and K.A.R. 1-4-2 |
| Position Change | Training Purposes | Use in accordance with K.A.R. 1-4-2, K.A.R. 1-4-7, K.A.R. 1-4-8, K.A.R. 1-6-22a (Training Classes) and K.A.R. 1-6-31 (Governor's Training Program) to temporarily reallocate a position to the lowest level class in a series when it serves as a training class for training a new employee or to use the Governor's Trainee Program. |
| Position Change | Title Change | Use in accordance with K.A.R. 1-4-3 and K.A.R. 1-4-7 when a position is reviewed and the job classification changes to a new job classification on the same pay grade. Also use on unclassified job code changes to existing positions. |

# Relationships

## Between Job Data Actions and Employee Status

- When you select an action to change a person's job data, the system may change the employee's HR or Payroll Status. HR Status indicates whether the employee is still active in the human resources system. The Payroll Status indicates the payroll or job status of the employee. A person can have an active HR status but not currently receiving pay. Conversely, a person could have an inactive job record but continue to receive pay.

- For example, if you select the Action of Paid Leave of Absence, SHARP changes the HR Status to Inactive and changes the Payroll Status from Active to Leave With Pay.




**TIP**
A change in HR Status or Payroll Status can affect an employee's benefits or payroll processing.

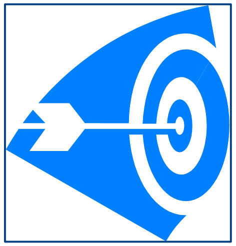
## Effective Dates

In this topic, let's discuss effective dates, which allow you to store historical data, see changes in data over time, and enter future data.

Effective dates enable you to maintain a chronological history of all of your data - allowing you to scroll back to a particular time to look at information on position data or employee records. You can view History (past), Current (present), and Future information on positions and employees.

All Job Data pages (except Employment Data) use effective dated rows. When you insert a new row on the Work Location page, the new date displays on the other Job Data pages.

Since Employment Data doesn't use effective dates, changes on the page overwrite existing data.



Click on + to insert new row.

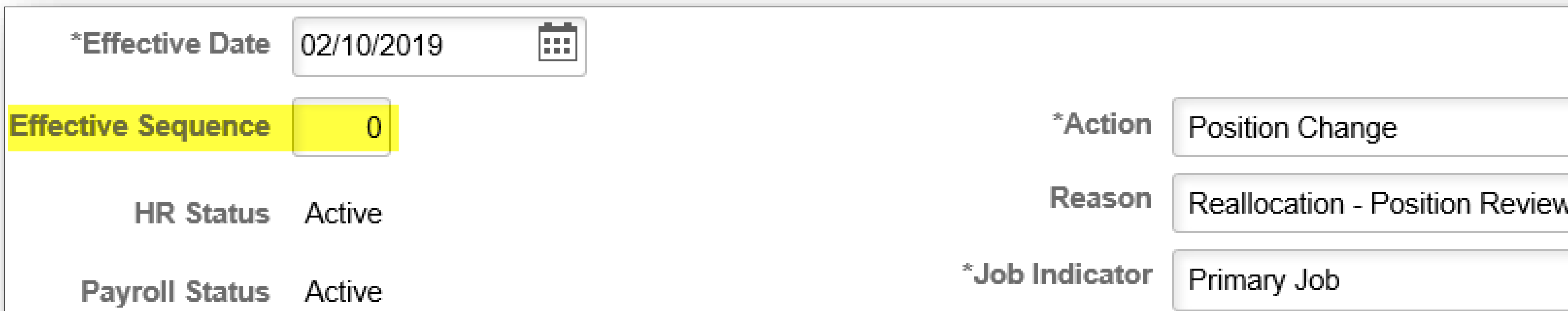
Today's date is on the new row – change the effective date if needed.

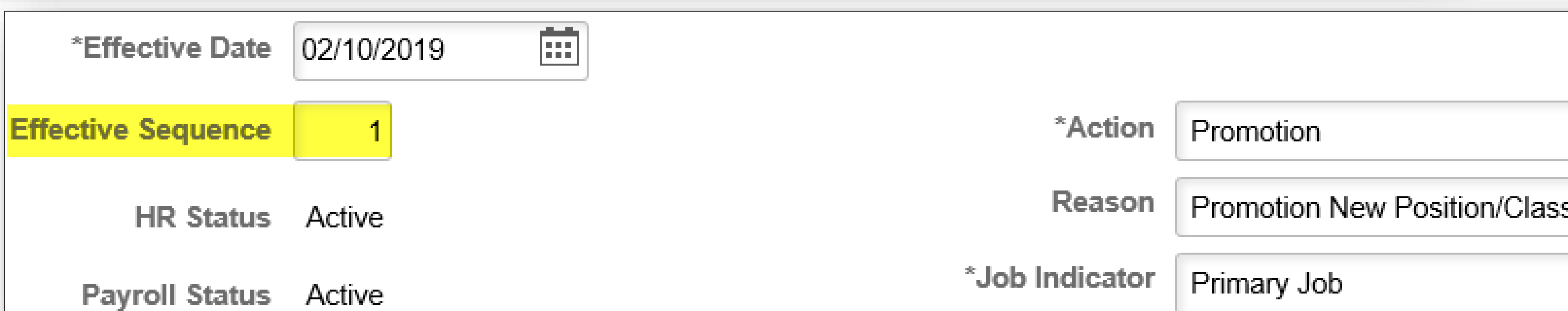
Data from the prior row copies into the new row.

Change the Action/Reason and other data as appropriate.

# Effective Dates – Effective Sequencing

Sometimes several actions are effective on the same date in Job Data. For example, two actions effective on the same date are needed when an employee's position is reallocated and the change results in a promotion and pay increase.



## Effective Dates

How to enter two rows with the same effective date in Job Data.

1. Add a row on Work Location page. Effective Sequence defaults to 0.
2. Enter Effective Date, Action/Reason and related data entry.
3. Add another row on Work Location page.
4. Enter 1 in Effective Sequence field.
5. Enter same Effective Date as on previous row.
6. Enter Action/Reason and related data entry.
7. Save.

# Add or View Data

## Add, Update/Display, or Include History Data

The action type you select determines what information you can see and what you can enter on each row.

For example, Update/Display only shows the top row of data, which may be current or future. No rows of history data show.

| Action | View | Change | Insert Row |
|---|---|---|---|
| Add | | | Create new record |
| Update/Display | Current, Future | Future Only | Effective date greater than or equal to current date |
| Include History | History, Current, Future | Future Only | Effective date greater than or equal to current date |
| Correct History (OPS Only) | History, Current, Future | All | Add or change rows with no restrictions |

# Add or View Data

## Correct History

Only designated staff in the Office of Personnel Services, Department of Administration, can Correct History to add or change rows with no date restrictions.

If you need to correct current or historical data, submit a request to the SHARP Corrections staff.

Click on the 'Corrections' link on the SHARP Customer Service website at https://www.admin.ks.gov/offices/personnel-services/sharp or send an email to sharp@ks.gov.

# ❑ Add or View Data

## ❑ How Action Types Work in Job Data

**Update/Display**

All agencies have Update/Display access

- View current and future-dated rows (not history)
- Change future-dated rows (not current or history)
- Insert new rows with an effective date greater than or equal to the date of the current row

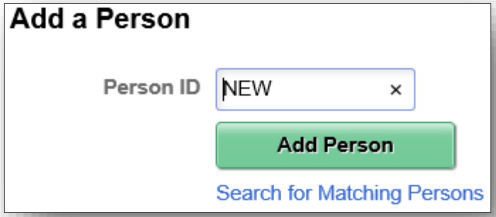
**Include History**

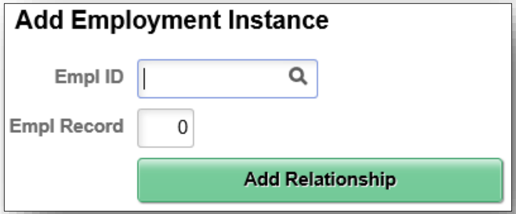
All agencies have Include History access

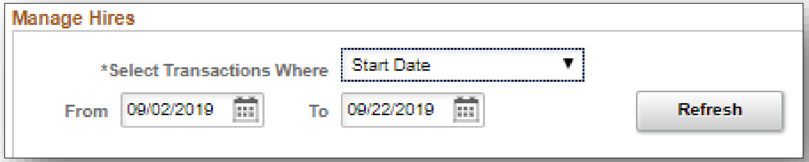
- View all Job Data – future, current, and history
- Change future dated rows (not current or history)
- Insert new rows with an effective date greater than or equal to the date of the current row

# ❑ Add or View Data

## ❑ How Action Types Work in Job Data

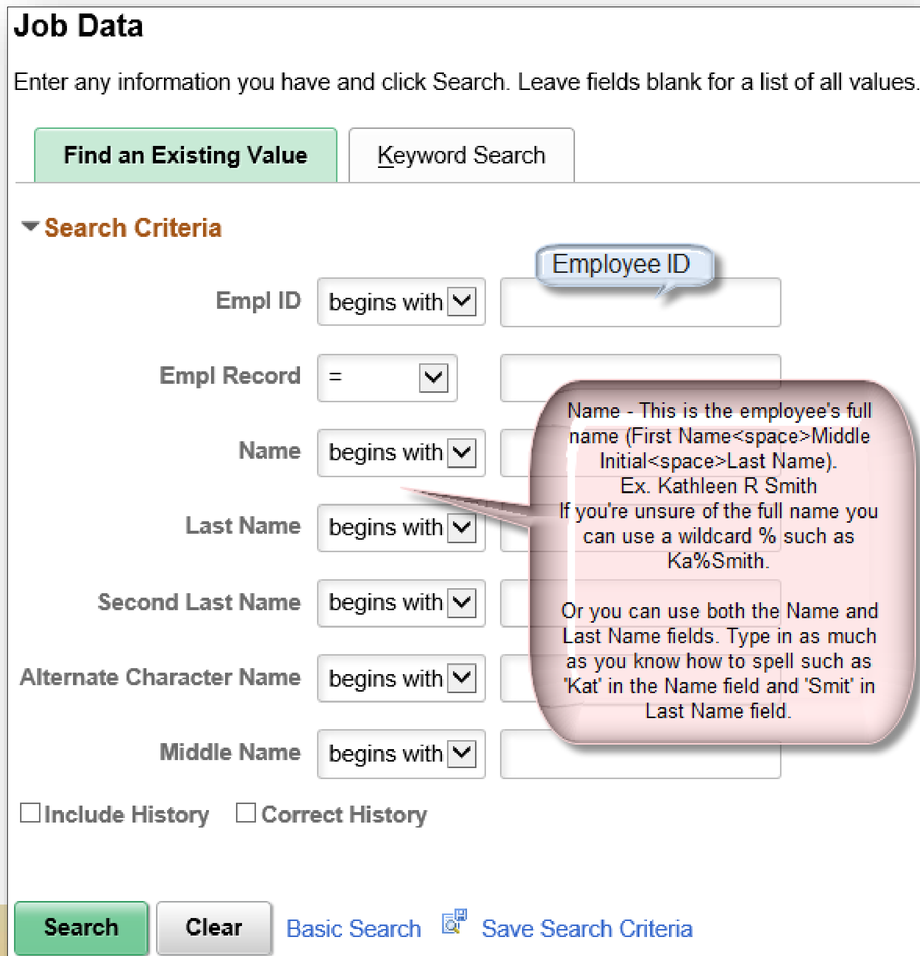

All agencies can add new records to SHARP.

You must enter all required information for the record to add to SHARP.

Here are three examples of the Add action type.

# Workforce Administration Pages

## Searching for Employees




SHARP has several ways to search for employees.

You can enter information in fields on the Job Data search page.

# Workforce Administration Pages

## Searching for Employees

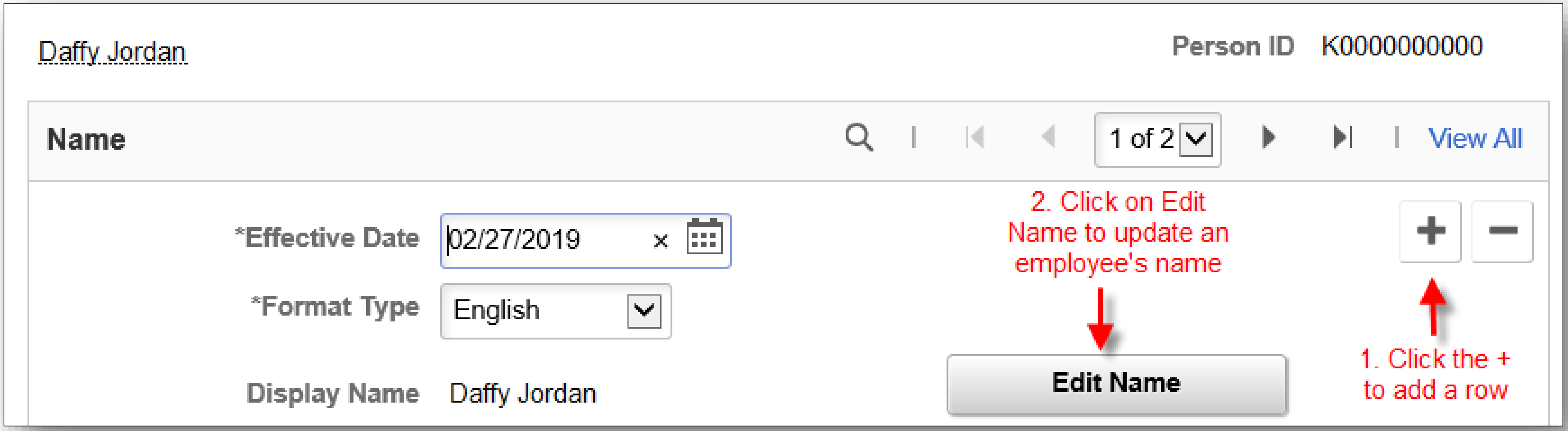
Search by National ID (Social Security Number) in Personal Information.


Click here after SS Number is entered

# Workforce Administration Pages

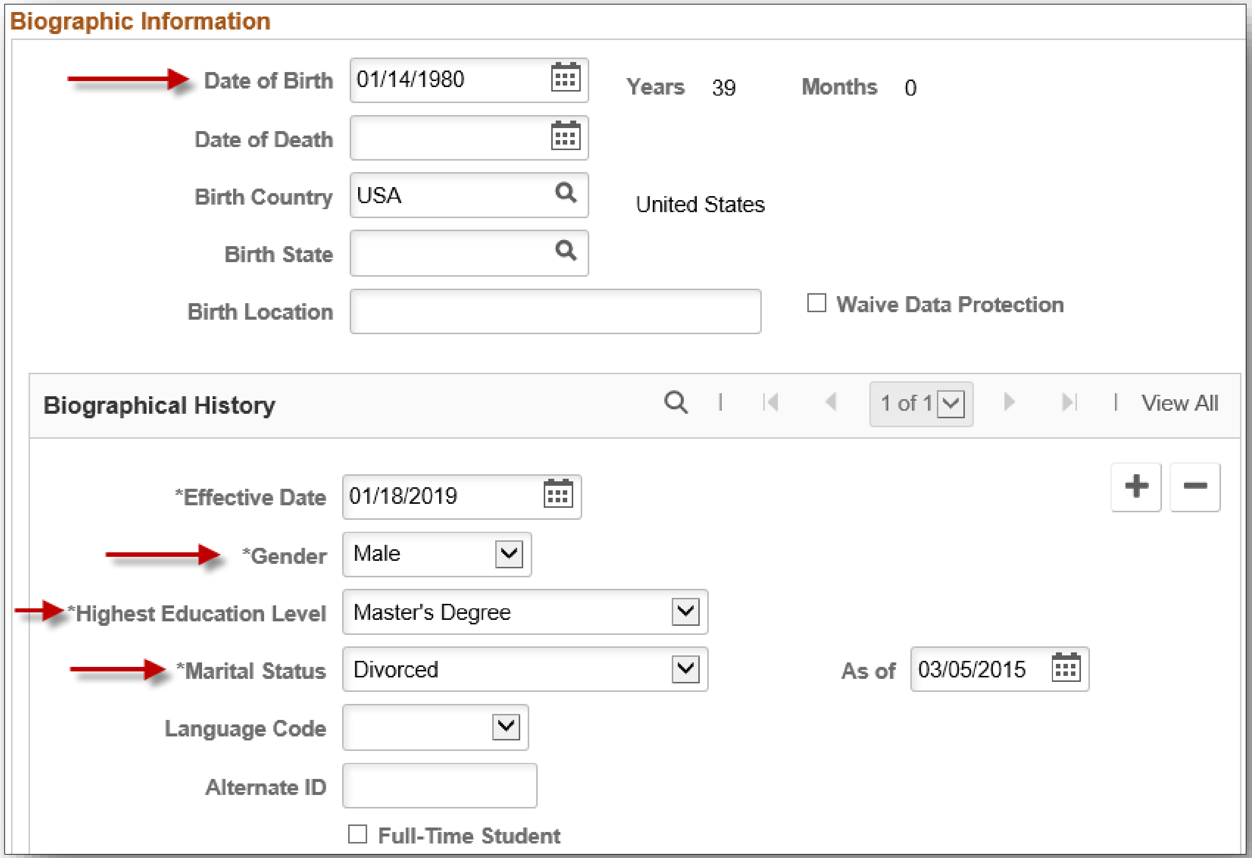
## Personal Information - Name

Employee Name, Address, and SSN are some of the data entered in Personal Information. We'll just look at a few of the fields here. More detailed information is provided in Lesson 2.



# Workforce Administration Pages

## Personal Information




You will enter data in these fields.

Date of Birth

Gender

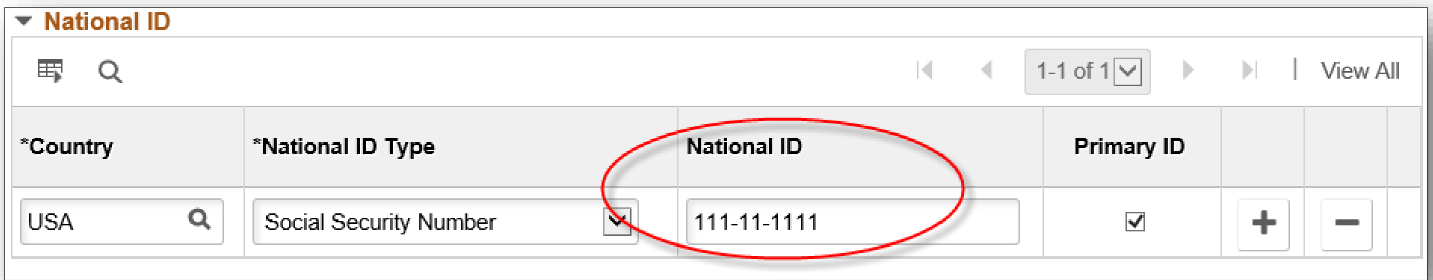
Highest Education Level

Marital Status

# Workforce Administration Pages

## Personal Information

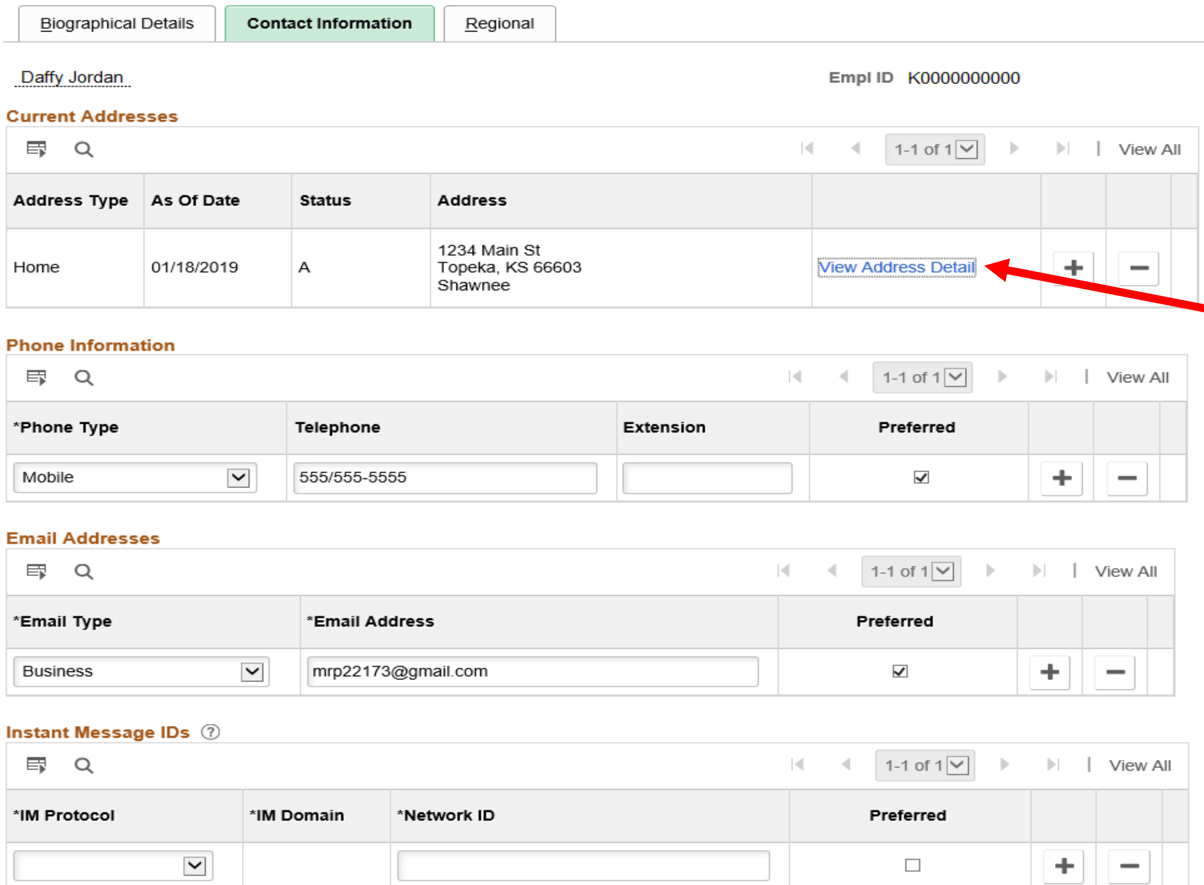
The employee's Social Security Number is stored in the National ID field.




**NOTE:** Depending on your SHARP security, Birthdates and SS numbers may be data masked for security purposes. Birthdates will appear as Month/Day/XXXX (01/14/XXXX) and SS numbers only showing the last four digits (XXX-XX-1111).

# Workforce Administration Pages

## Personal Information

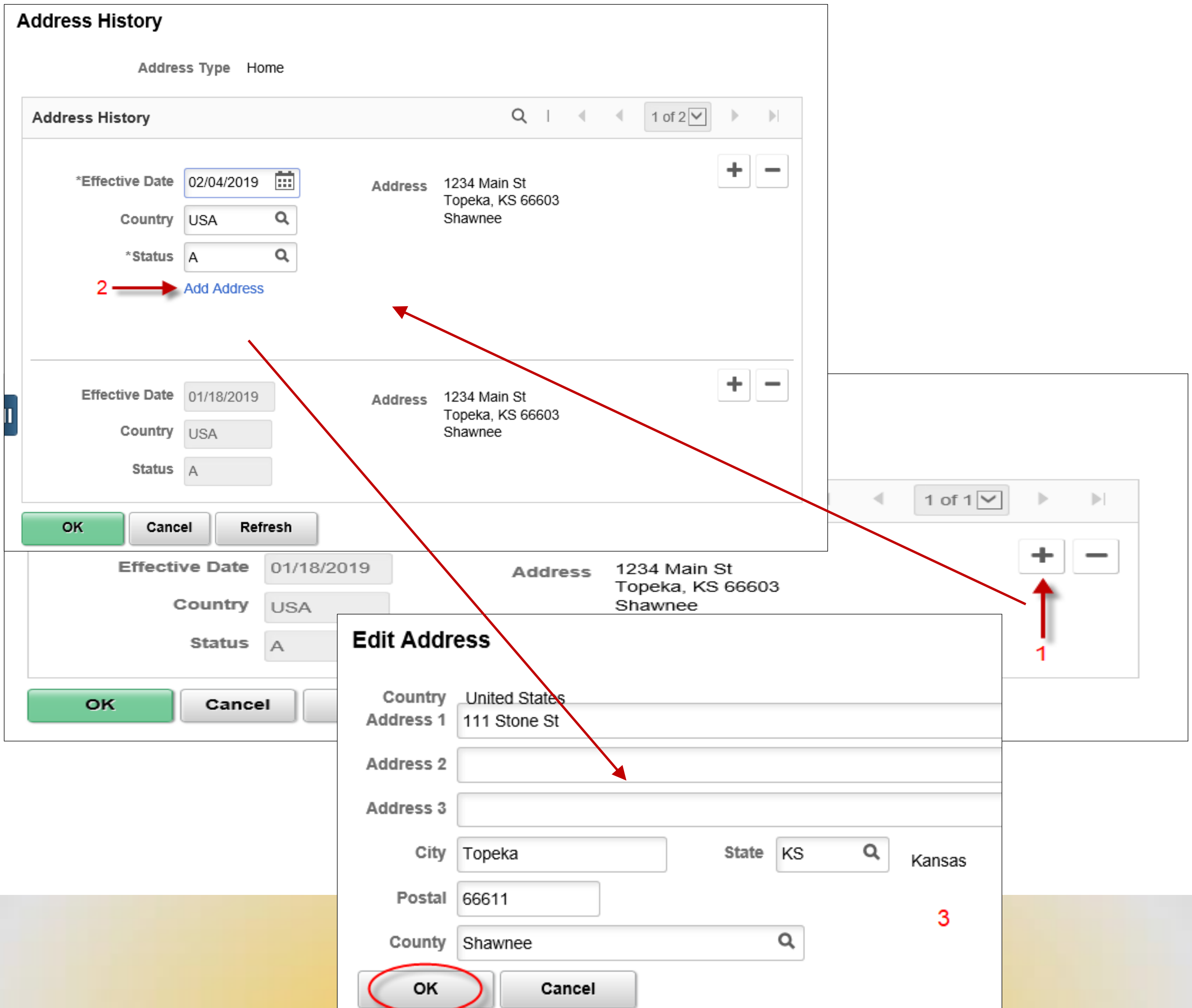



**<u>Do not</u>** click the + button in Current Addresses to change the address. The + button here is used to add another type of address, such as mailing.

To change an employee's Home address, click on this link to open a new area to change the address.

Go to the next page to see how this is done.

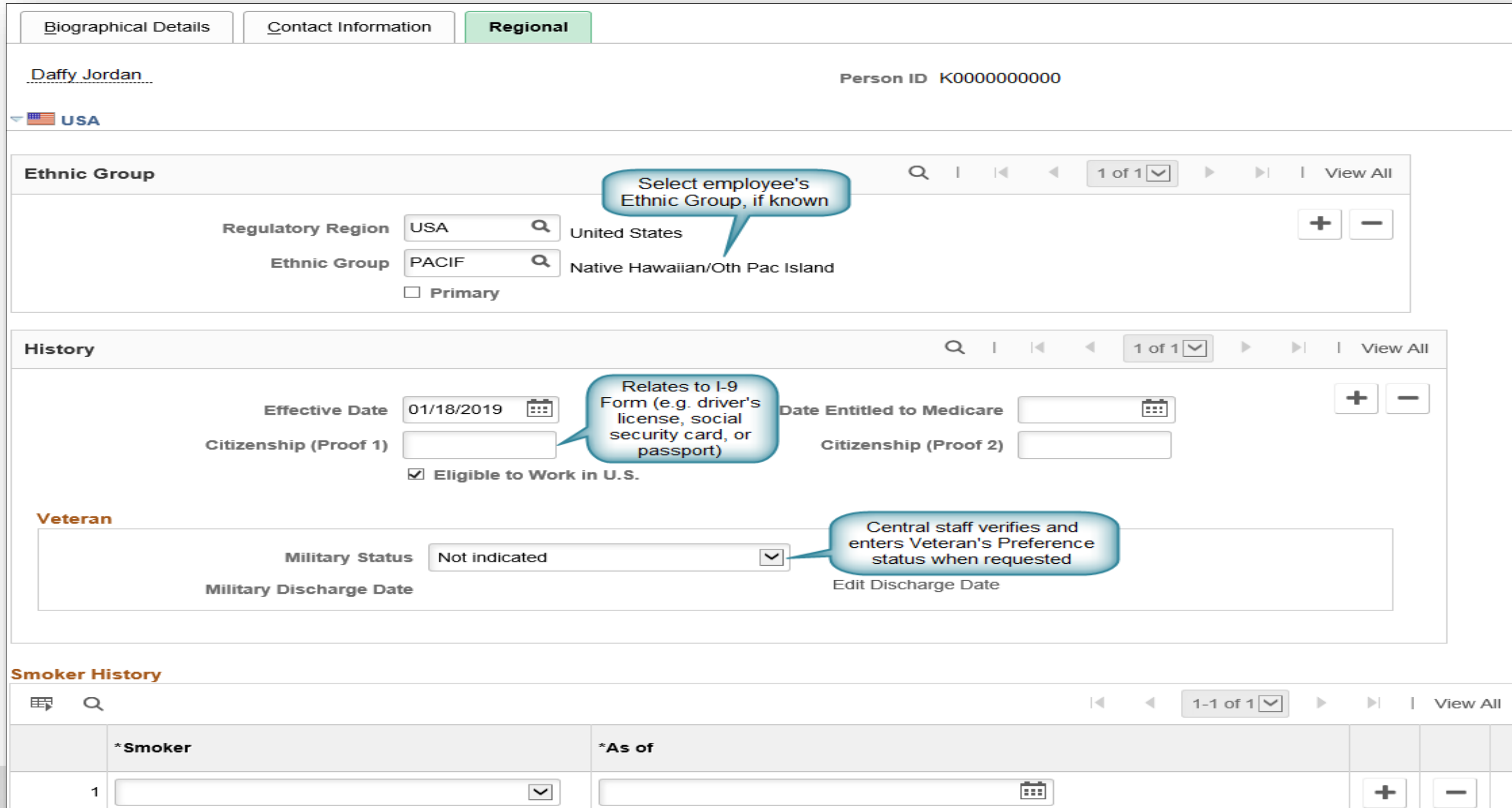
# Workforce Administration Pages




1. Click the + to open Address History.
2. Click Add Address link to open Edit Address.
3. Change the address and click OK to return to Personal Information.
4. Save

## ❑ Workforce Administration Pages

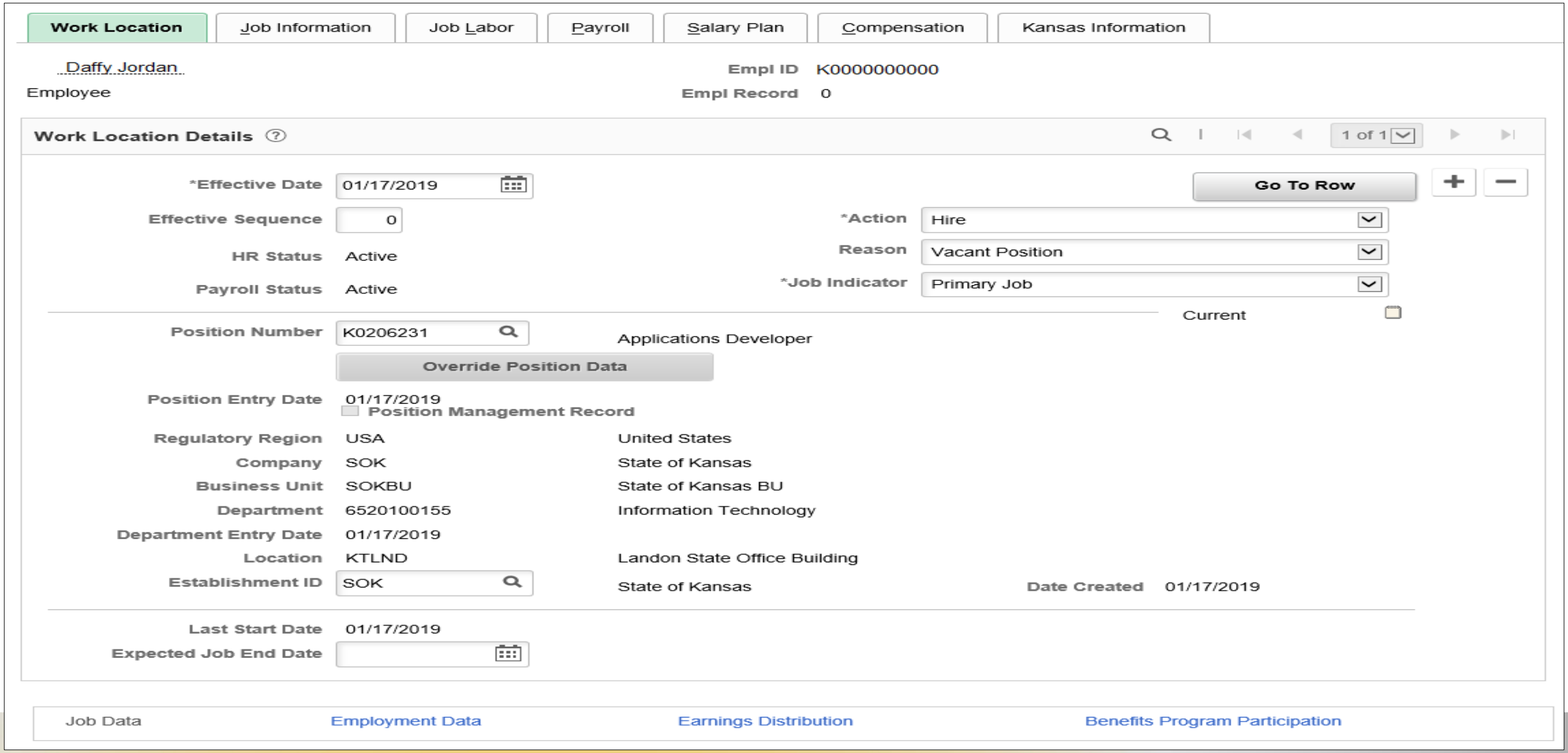
### ❑ Personal Information



# Workforce Administration Pages

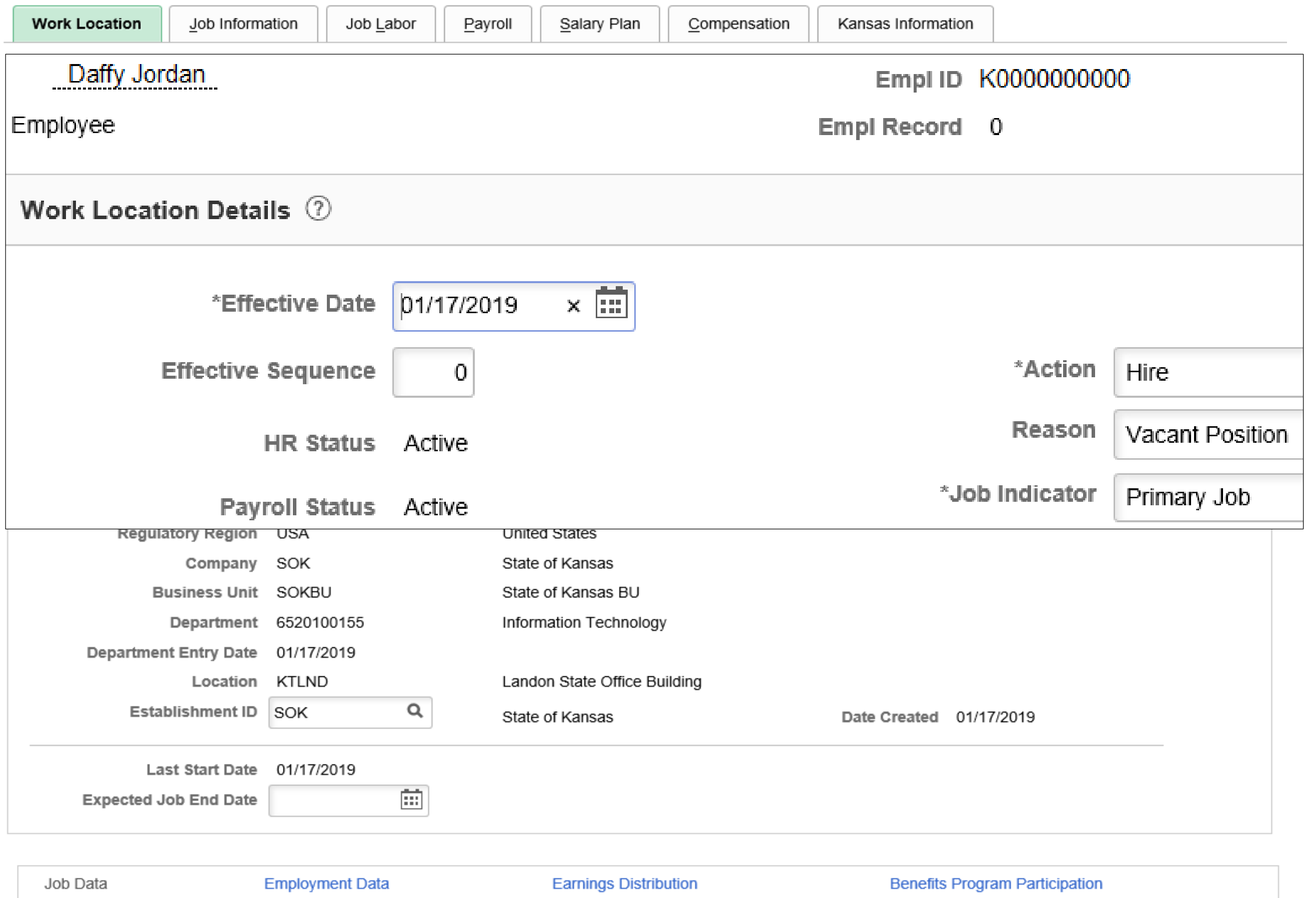
## Job Data

Job Data contains several pages and links. Here is where you'll view or enter a person's employment with the State of Kansas, such as promotions, transfers, and retirement. Let's review the pages and links and discuss the information in the fields.



# Workforce Administration Pages

## Job Data – Work Location




**This information is at the top of each page in Job Data**

Effective Date: Date the data goes into effect

Sequence: Enter values 0-9 to create multiple job records on the same effective date

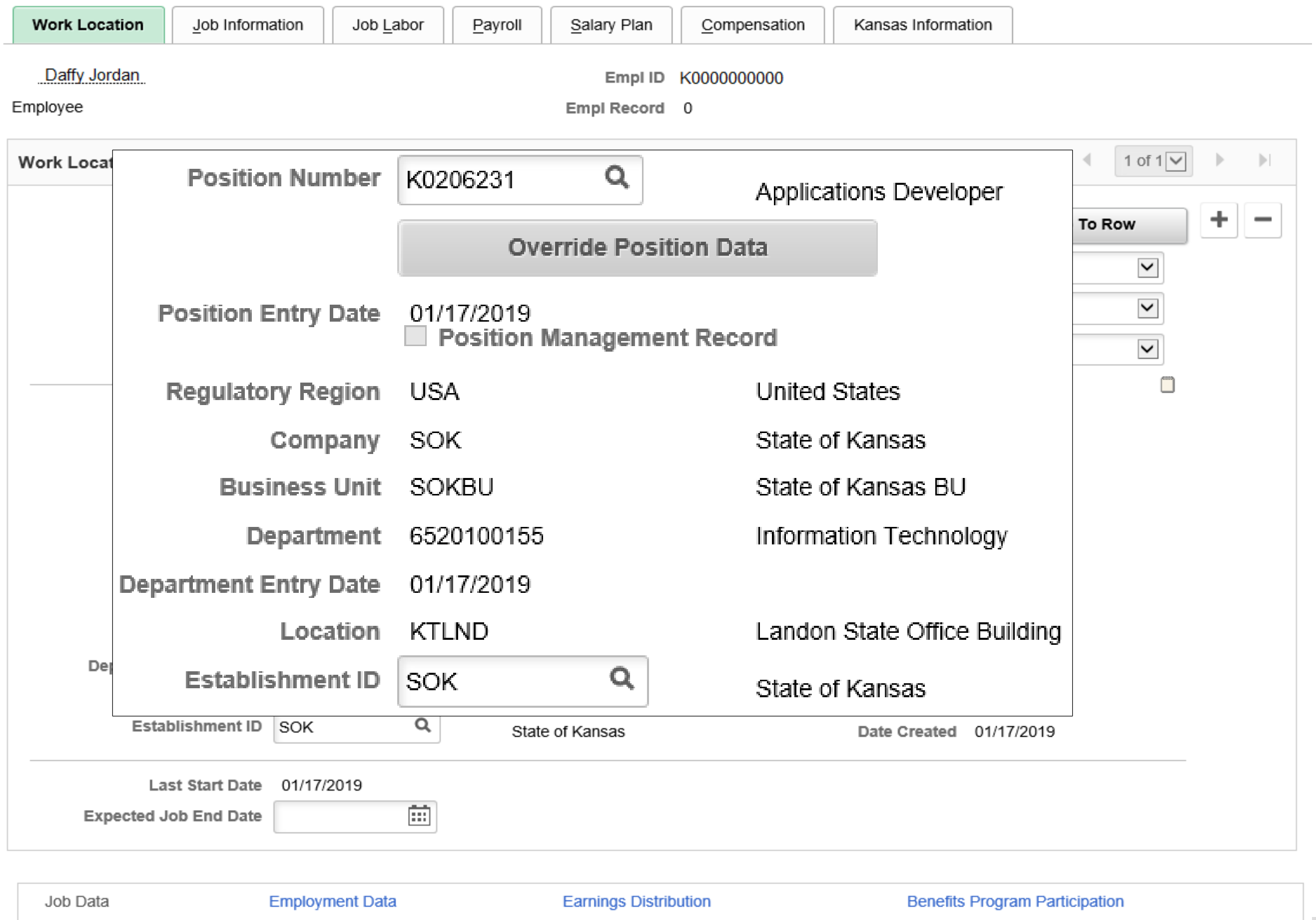
HR Status: Indicates if person is Active, Suspended, or Terminated in SHARP.

Payroll Status: Indicates if person is active in payroll system and receiving pay.

Action/Reason: Select job Action/Reason for the change

# Workforce Administration Pages

## Job Data – Work Location

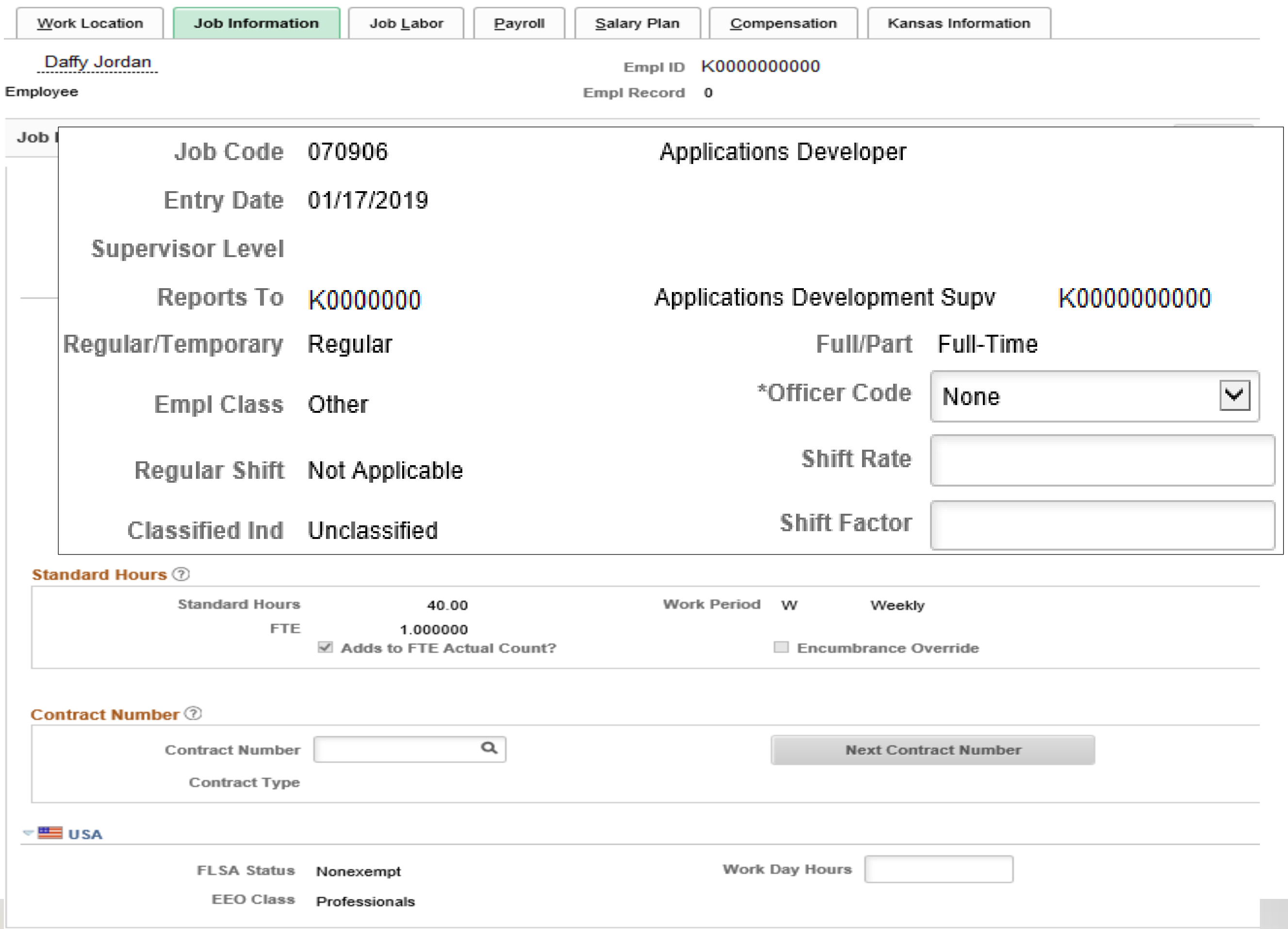



Position Number: Position to which employee is assigned

Position Entry Date, Department, Department Entry Date and Location default from Position Data

# Workforce Administration Pages

## Job Data – Job Information


Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation | Kansas Information

Daffy Jordan
Employee
Empl ID K0000000000
Empl Record 0

Job Code 070906 Applications Developer
Entry Date 01/17/2019
Supervisor Level
Reports To K0000000 Applications Development Supv K0000000000
Regular/Temporary Regular
Full/Part Full-Time
Empl Class Other
*Officer Code None
Regular Shift Not Applicable
Shift Rate
Classified Ind Unclassified
Shift Factor

Standard Hours
Standard Hours 40.00
Work Period W Weekly
FTE 1.000000
Adds to FTE Actual Count?
Encumbrance Override

Contract Number
Contract Number
Next Contract Number
Contract Type

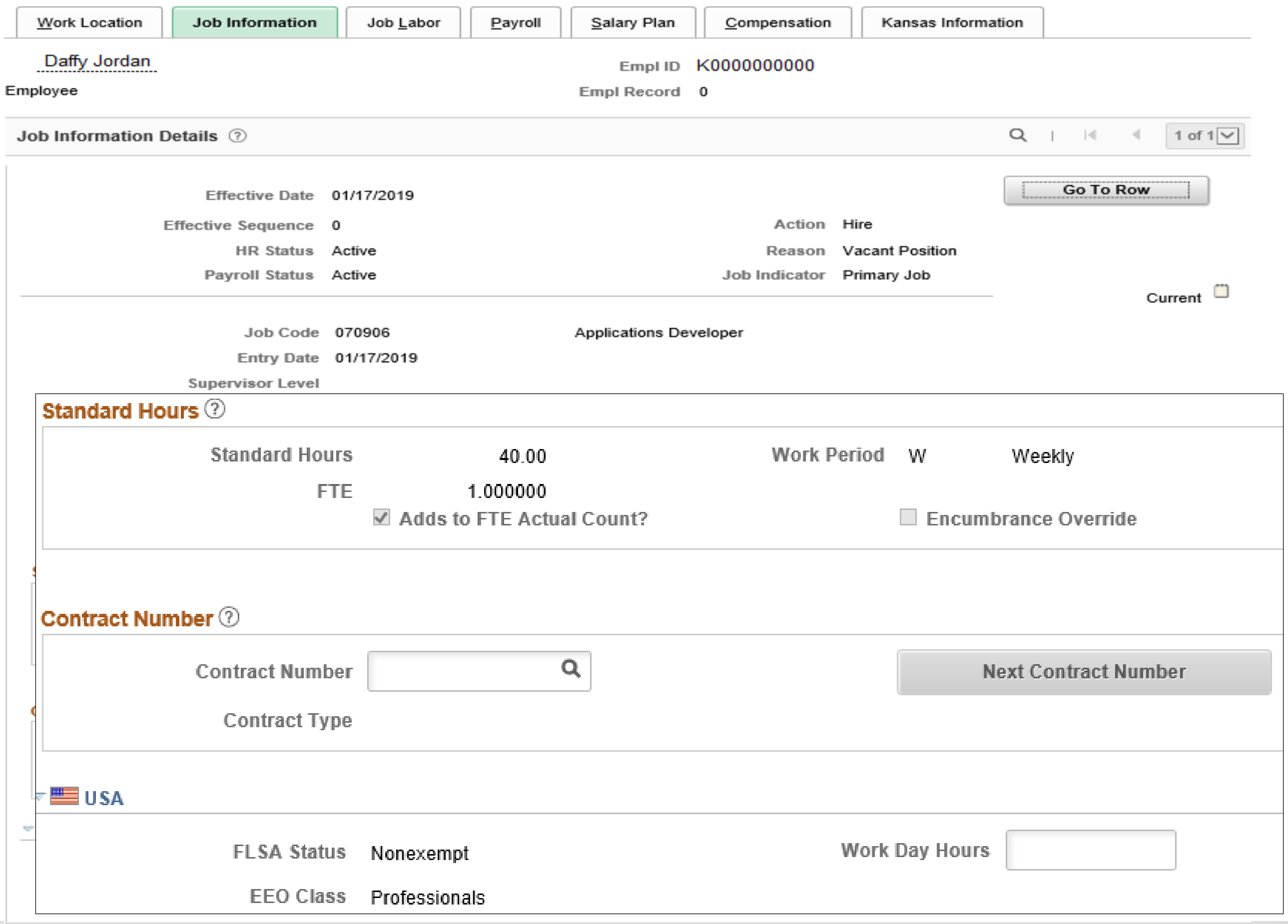
USA
FLSA Status Nonexempt
Work Day Hours
EEO Class Professionals

**All information on this page defaults from Position Data.**

<u>Job Code</u>: Job Code of the job classification
<u>Entry Date</u>: Date the employee began working in the job code
<u>Reports To</u>: Position number and Title of employee's supervisor.
<u>Regular/Temporary</u>; Indicates if position is Regular or Temporary
<u>Full/Part</u>: Indicates if position is Full Time or Part Time
<u>Empl Class</u>: Identifies general employee groups and may affect leave accrual
<u>Classified Indicator</u>: Indicates if the position is classified or unclassified.

# Workforce Administration Pages

## Job Data – Job Information

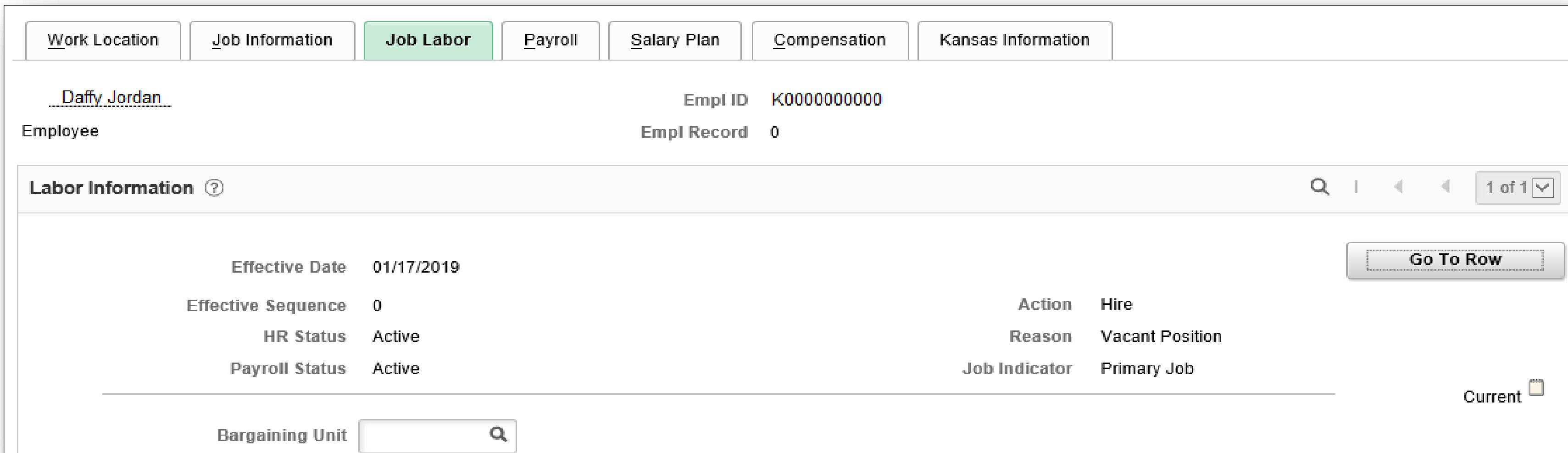



<u>Standard Hours</u>: Number of hours an employee is scheduled to work each week and is used in SHARP calculations.
<u>Work Period</u>: Should always be Weekly
<u>FTE</u>: Full Time Equivalent of the position
<u>Adds to FTE Actual Count?</u>: Indicates if the position counts toward agency FTE total
<u>FLSA Status</u>: Indicates if position is exempt or nonexempt
<u>EEO Class</u>: EEO category of the position's job code. Defaults from Job Code Table

# Workforce Administration Pages

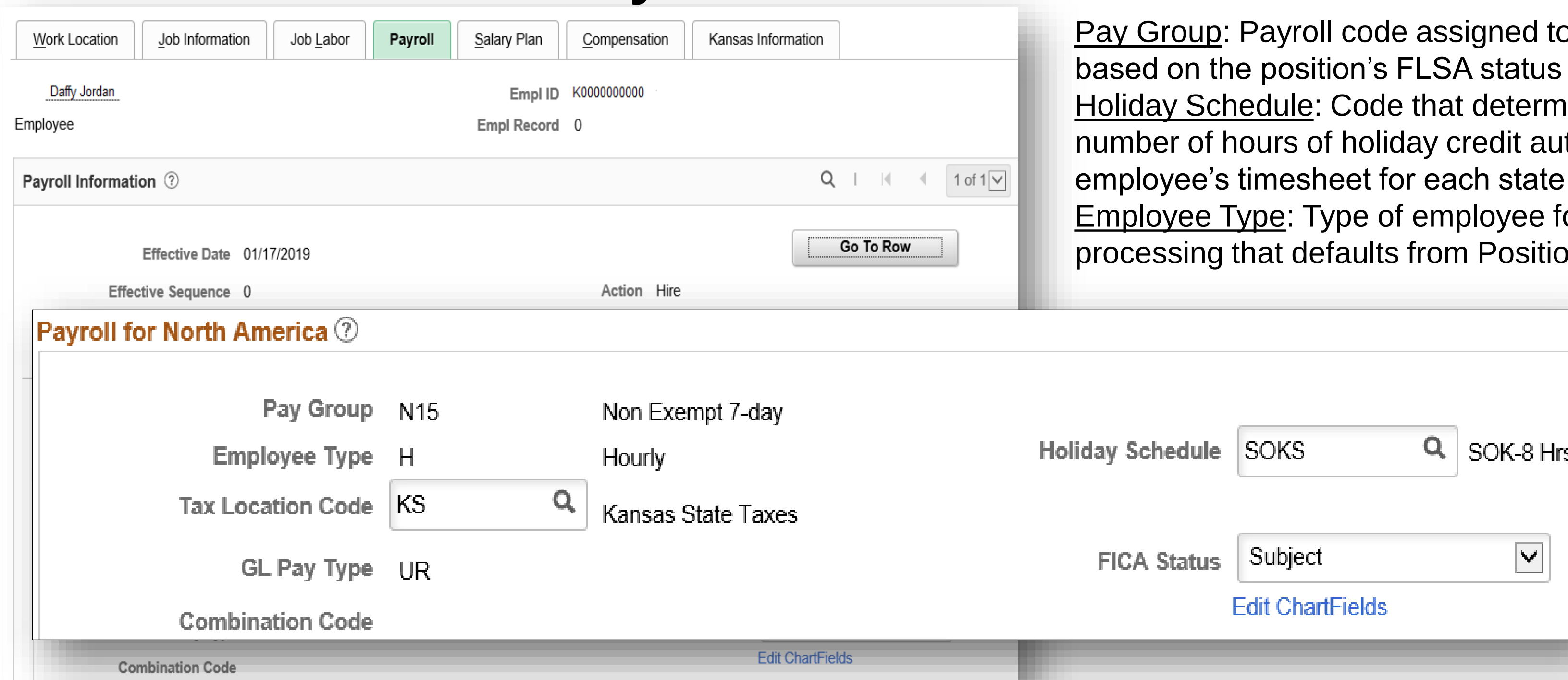
## Job Data – Job Labor

**State of Kansas does not use this page**



# Workforce Administration Pages

## Job Data - Payroll




<u>Pay Group</u>: Payroll code assigned to employees based on the position's FLSA status

<u>Holiday Schedule</u>: Code that determines the number of hours of holiday credit auto-inserted on employee's timesheet for each state holiday

<u>Employee Type</u>: Type of employee for payroll processing that defaults from Position Data

<u>Tax Location Code</u>: Code is based on employee's work location

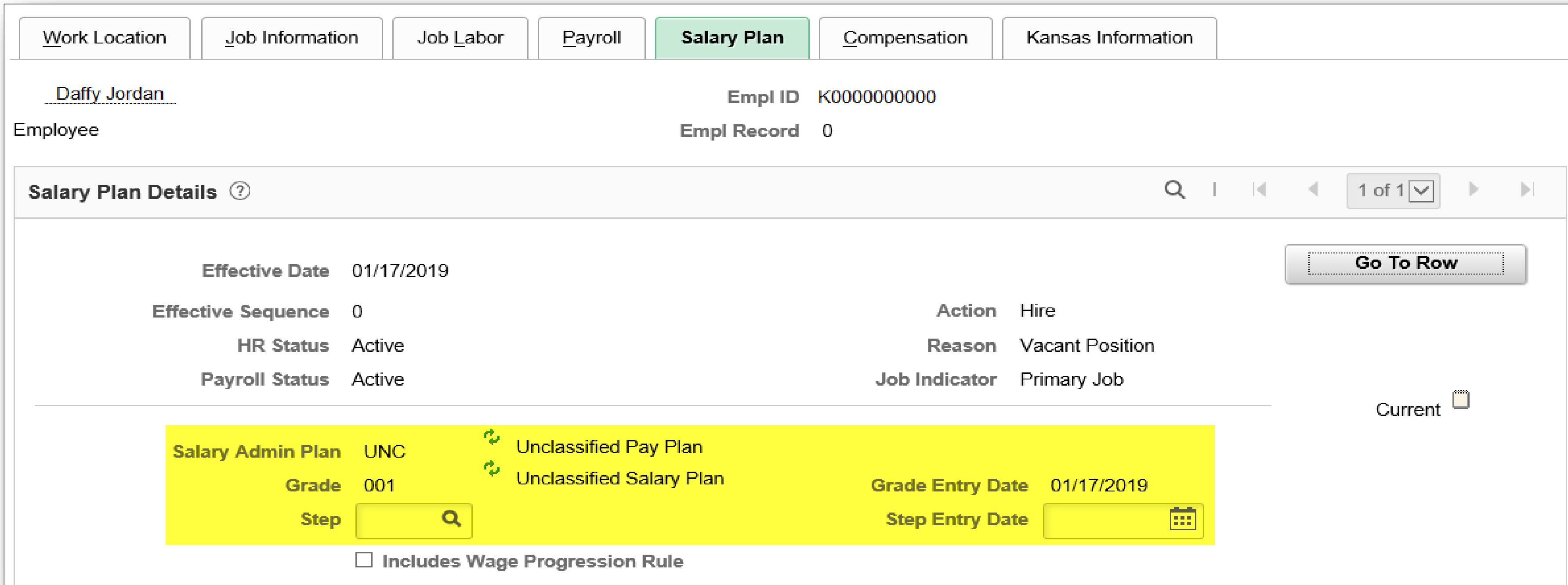
<u>FICA Status</u>: Determines Social Security and Medicare taxes

<u>GL Pay Type</u>: Determines correct expenditure sub-object to charge to payroll when general ledger transaction is charged. Defaults from Position Data.

<u>Combination Code</u>: Used for funding sources in Commitment Accounting

# Workforce Administration Pages

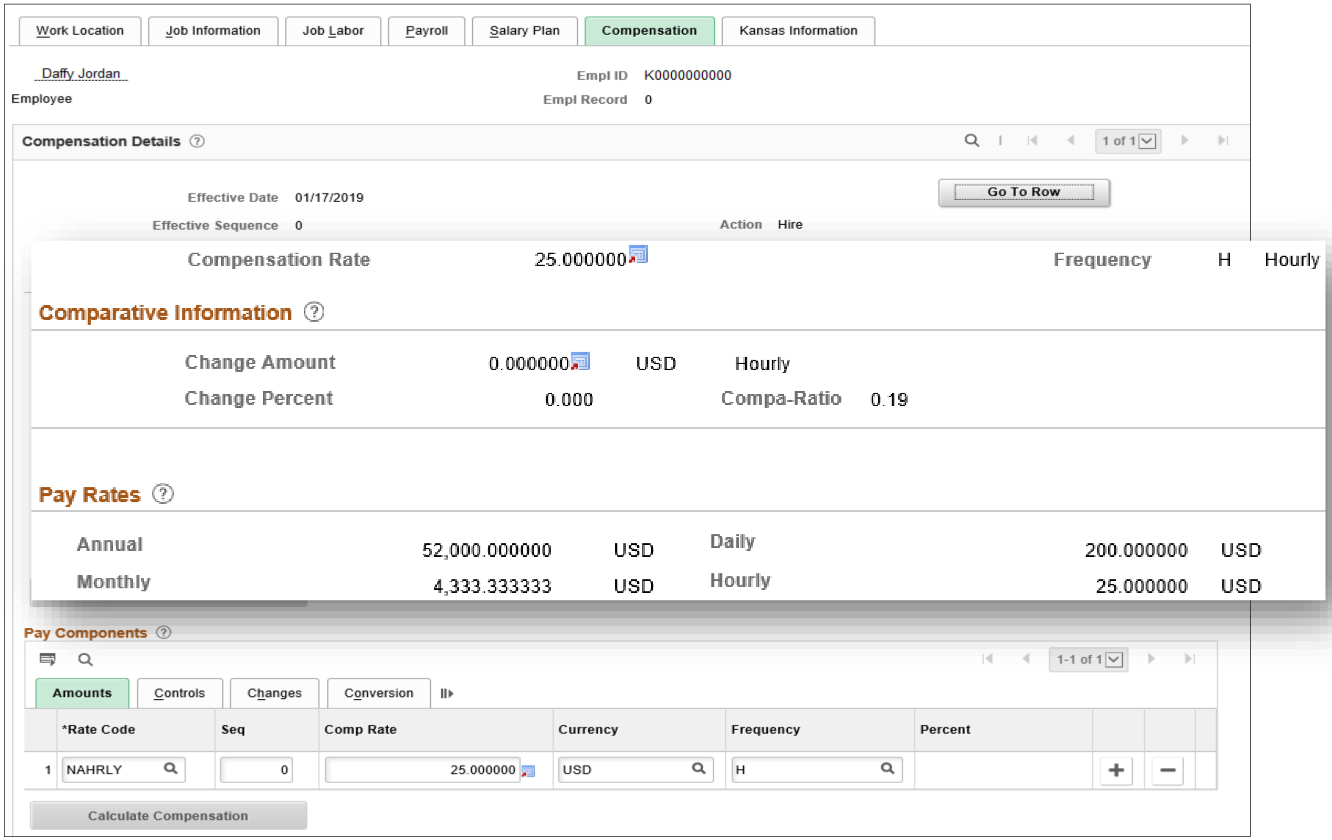
## Job Data – Salary Plan




<u>Salary Administration Plan</u>: Salary Plan associated with the position's job code
<u>Grade</u>: Pay grade on the salary plan
<u>Grade Entry Date</u>: Date on which the employee was first assigned to the pay grade
<u>Step</u>:  Pay grade step of the employee (Required for classified employees)
<u>Step Entry Date</u>: Defaults the date the employee entered this step of the pay grade

# Workforce Administration Pages

## Job Data - Compensation




Compensation Rate: Rate calculates based on the Comp Rate field on the bottom of the page. It is based on the Compensation Frequency of either Hourly (nonexempt employees) or Biweekly (exempt employees)

Frequency: Defaults in based on the position's FLSA Status and Employee Type

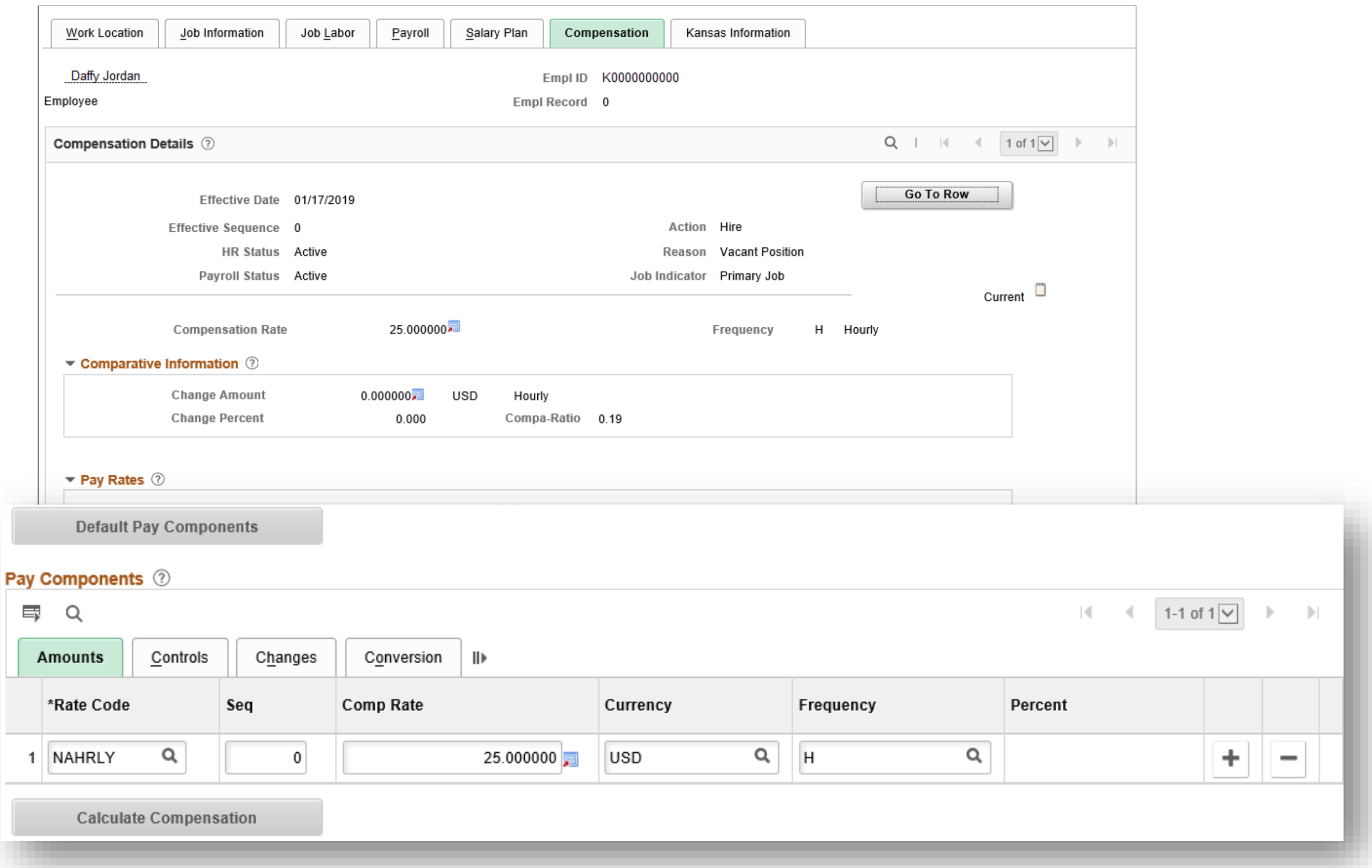
Change Amount: Amount of any changes in compensation rate between the current row and prior effective dated row

Change Percent: Percent of any changes in compensation rate between the current row and prior effective dated row

Pay Rates of Hourly, Daily, Monthly, Annual: Calculated rates based on the comp rate and position's Standard Hours

# Workforce Administration Pages

## Job Data – Compensation cont.

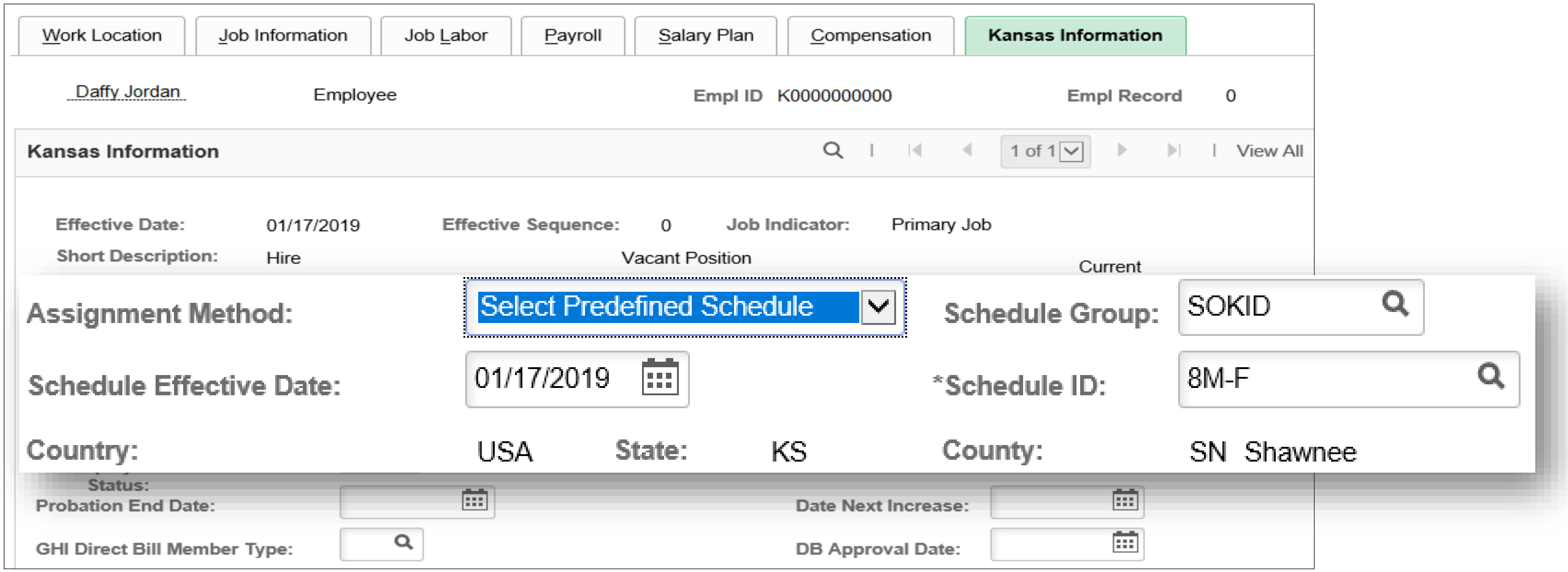



Rate Code: Most common is NAHRLY (North American Hourly)

Seq: Sequence is most often 0

Comp Rate: The rate in this field calculates the rates in the Pay Rates area (Annual, Daily, etc.). Press the **Default Pay Components** button used for employees who are on a pay grade/step to pull the hourly rate into this field. For employees who are not on a pay grade/step (such as unclassified employees), enter an hourly rate and press the **Calculate Compensation** button.

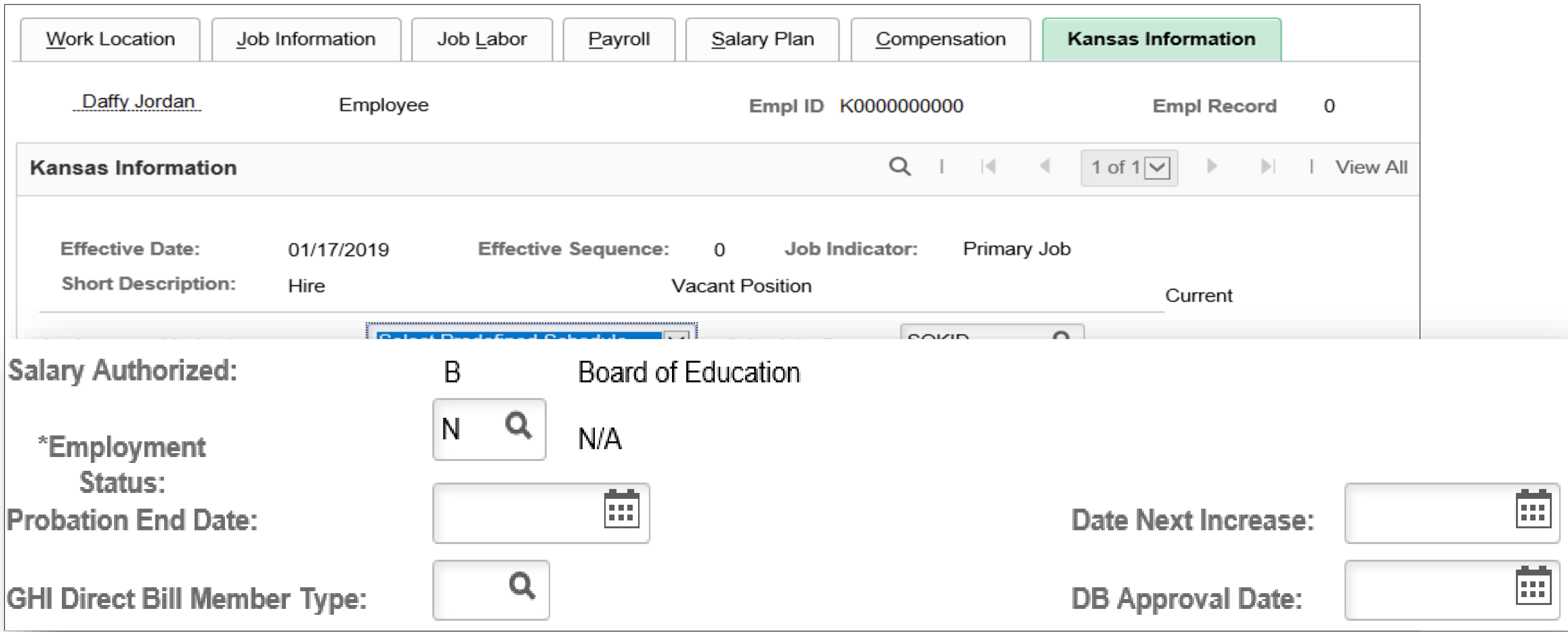
- Workforce Administration Pages
  - Job Data – Kansas Information




<u>Assignment Method</u>: Default “Select Predefined Schedule”
<u>Schedule Group</u>: Default “SOKID”
<u>Schedule Effective Date</u>: Same as Hire date for this employee
<u>Schedule ID</u>: Employee’s ‘Work Schedule’ code
<u>Country and State</u>: Defaults to USA and KS
<u>County</u>: County where the position is located as indicated in Position Data

# Workforce Administration Pages

## Job Data – Kansas Information cont.

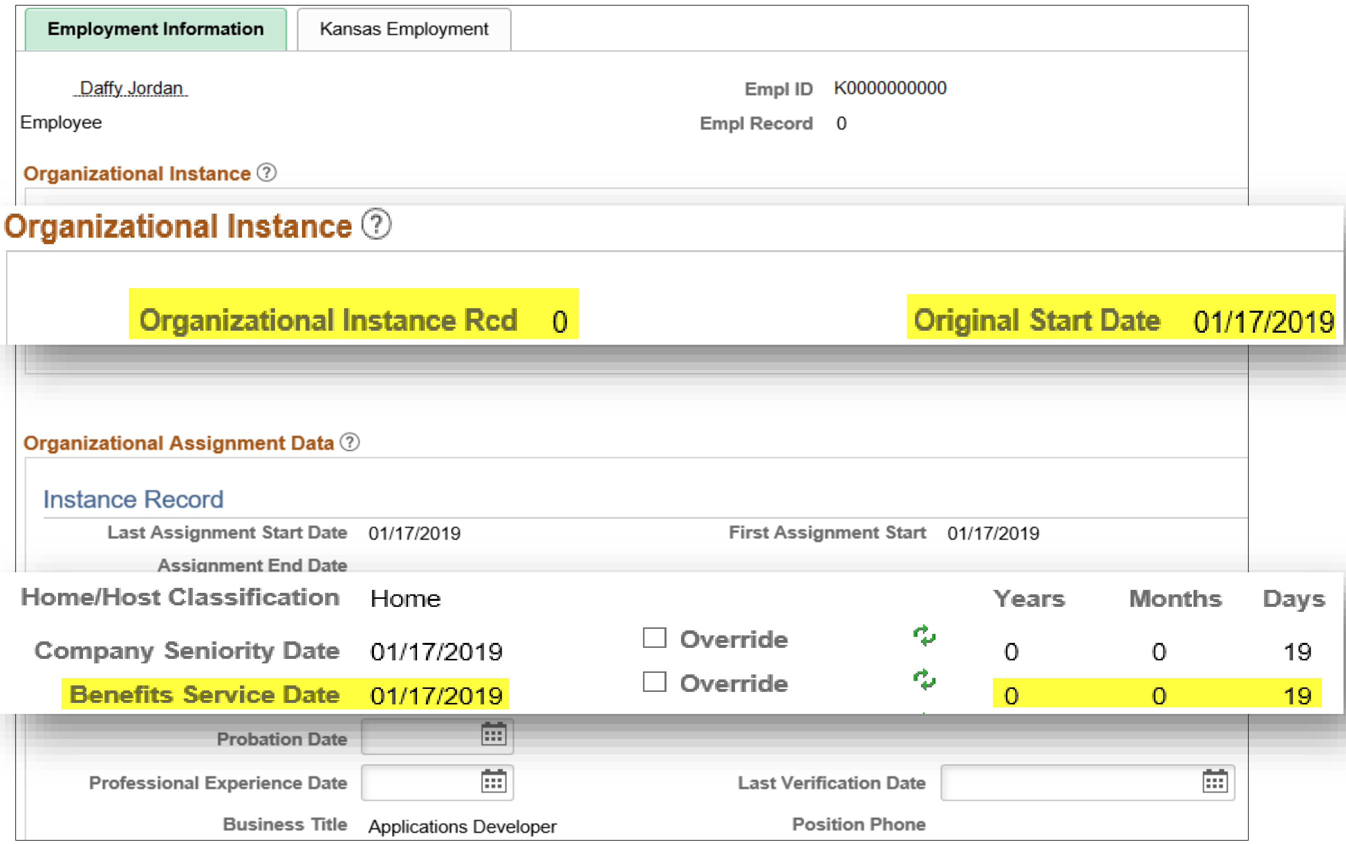



Salary Authorized: Defaults from Position Data
Employment Status: Status is Original Probation, Promotional Probation, Trainee, Permanent, or Not Applicable.
Probation End Date: Date the employee's Original Probation or Promotional Probation ends
Date Next Increase: For eligible employees, the system calculates when they are to receive their next step increase based on when the employee started on the current step.
GHI Direct Bill Member Type and DB Approval Date: Do not enter data in these fields

# Lesson 1: Overview of Workforce Administration

## Workforce Administration Pages

### Employment Data

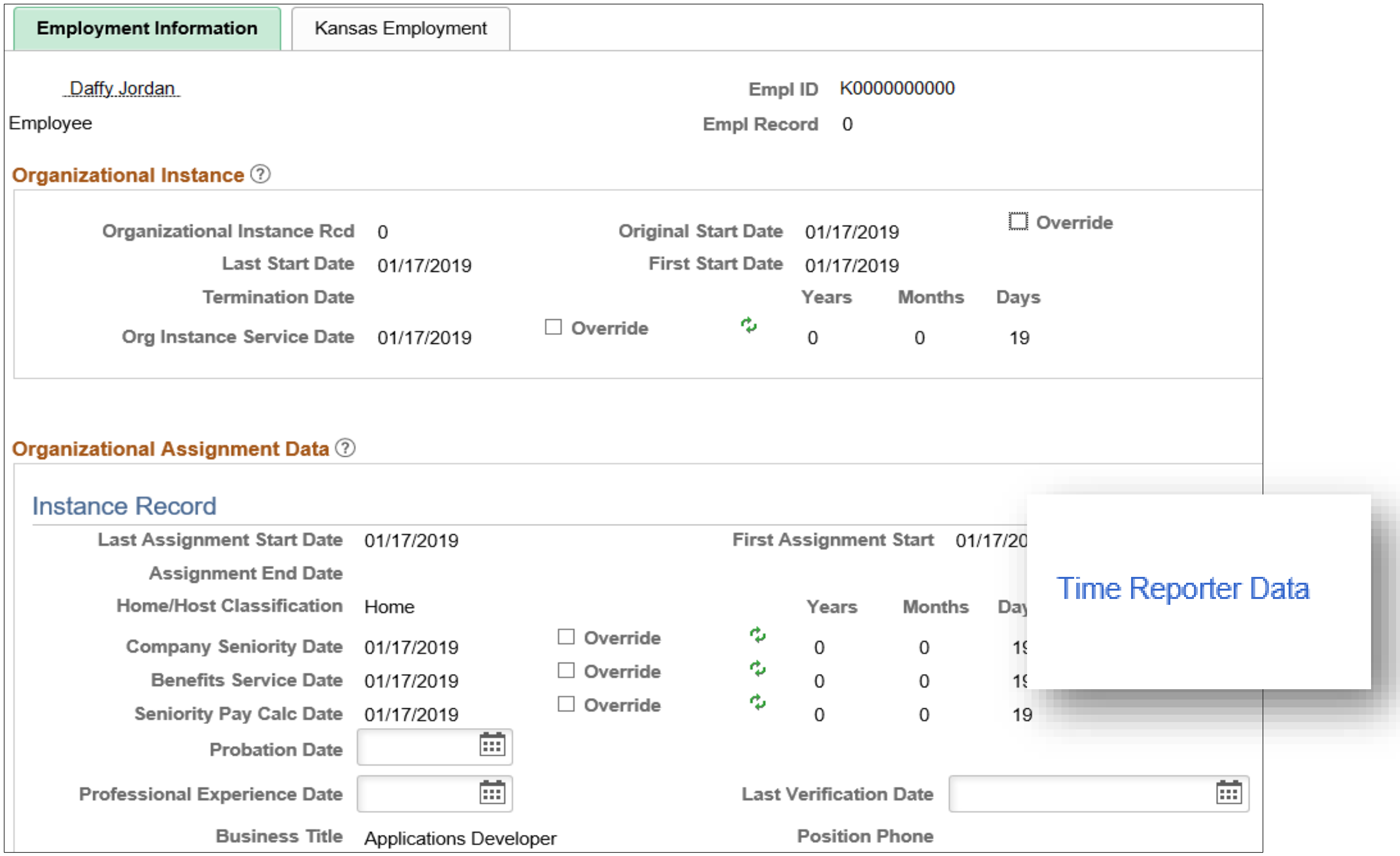



State of Kansas doesn't use many of the fields on this page. Below are the ones used:

Organizational Instance Rcd: Same as the Employee Record #
Original Start Date: Employee's original hire date
Benefits Service Date: Employee's service date used to calculate length of service. The date can be adjusted to adjust length of service.

# Workforce Administration Pages

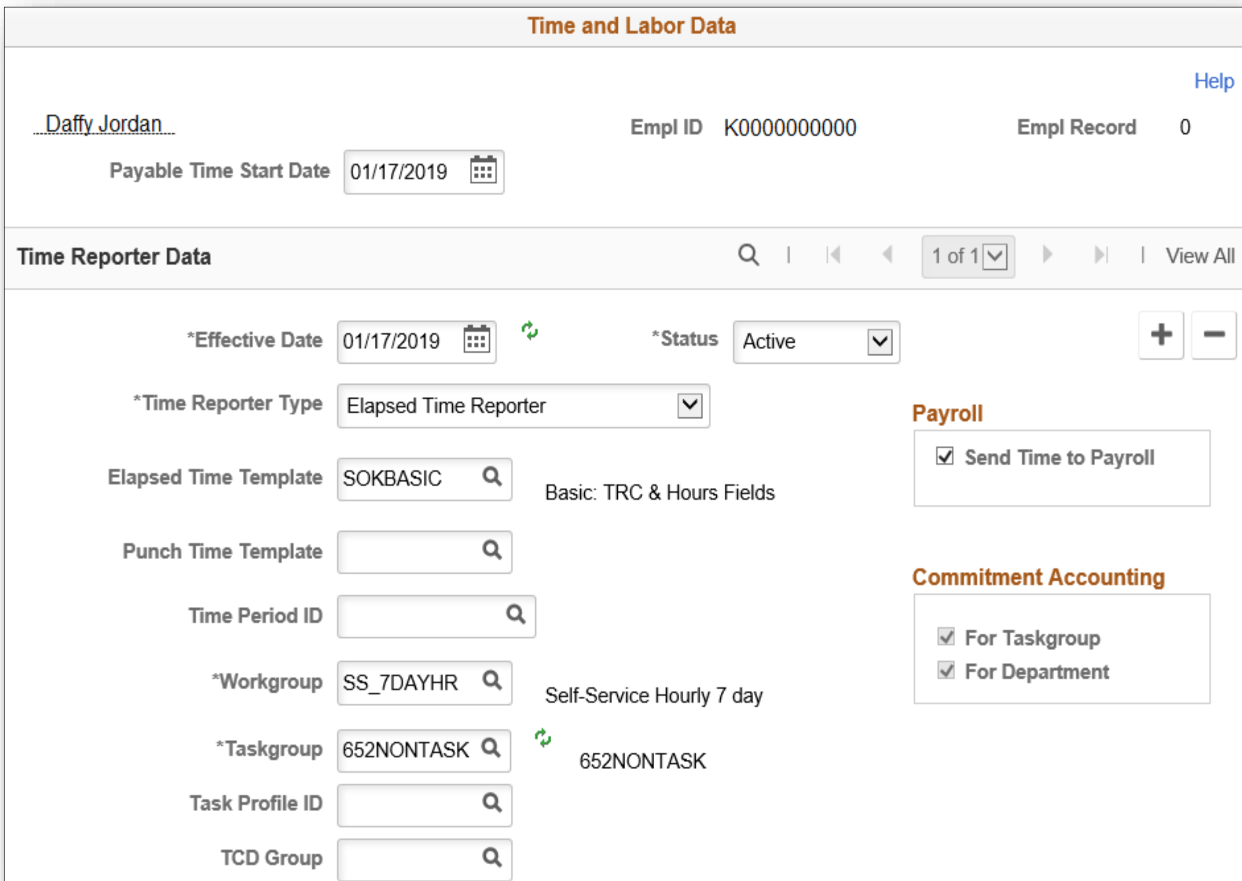
## Employment Data




Clicking on the Time Reporter Data link on the Employment Data page moves you to the Time and Labor Data page to enter Time Reporter Data.

# Workforce Administration Pages

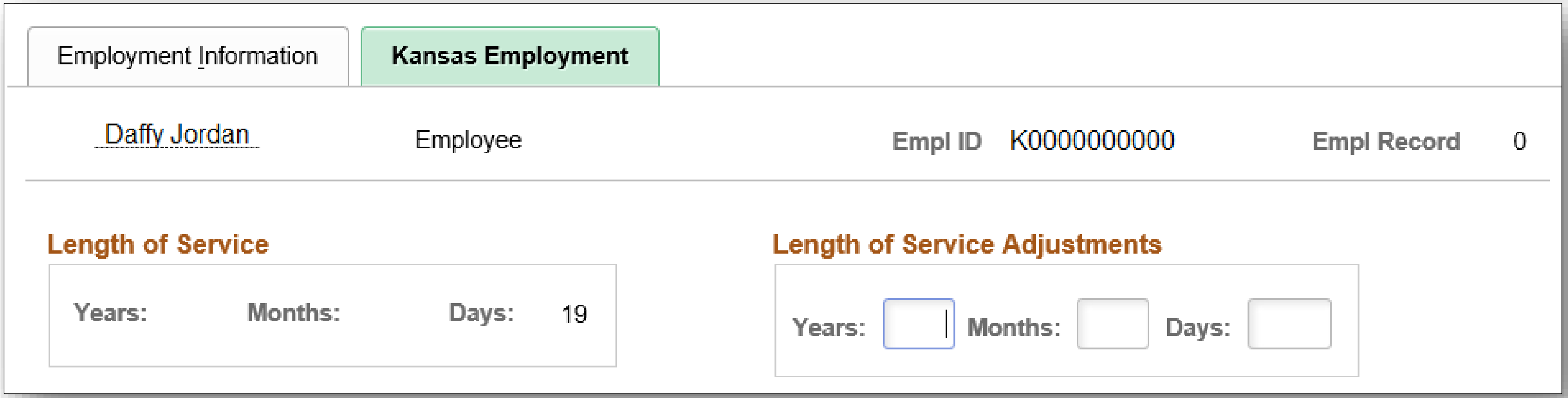
## Employment Data




You will enter data in fields in Time and Labor Data to set up timekeeping information on the employee. This page is discussed in more detail in Lesson 2 of the Workforce Administration computer-based training. The Time and Labor computer-based training provides even more in-depth information.

# Workforce Administration Pages

## Employment Data




Length of Service: Displays the current length of service which also shows on the Employment Information page.

Length of Service Adjustment: One way to adjust the length of service by entering a positive number to increase and a negative number to decrease length of service. For example, to deduct one year enter -1 in the Years field. To deduct 40 days, enter -40 in the Days field. The amount entered will be deducted or added after you save.

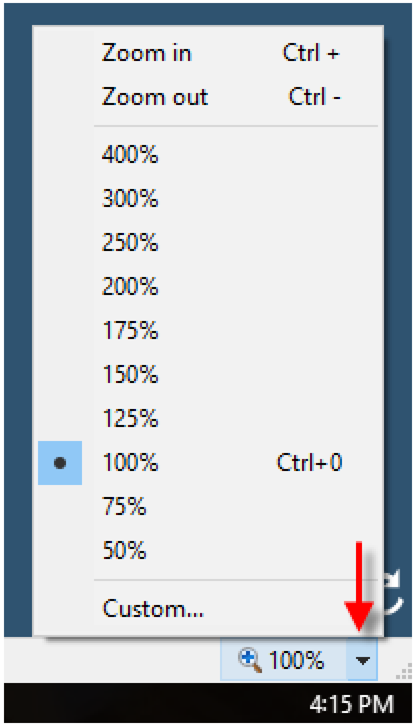
# Workforce Administration Pages

## Resizing SHARP Pages

Fluid pages on a computer monitor will be bigger and some pages may not fit within the screen without scrolling to see the remainder of the page.

To resize the page, hold the Ctrl key down then use the scroll on your mouse to increase or decrease the size.

You can also adjust screen size by clicking the change zoom level, located in the lower right hand corner of the page and selecting the predetermined sizes or enter a custom size.



# Workforce Administration Pages

## Benefit Program Participation

Use the Benefit Program Participation page to view or update information relating to an employee's eligibility for benefits and to enter Annual Benefits Base Rate information used to calculate imputed income for the employee.

Employees in benefits eligible positions are:
Classified Regular
Unclassified Regular
Unclassified Temporary with Employee Class of 'L' (Unclassified Temp Ben Elig) or 'P' (Special Project)

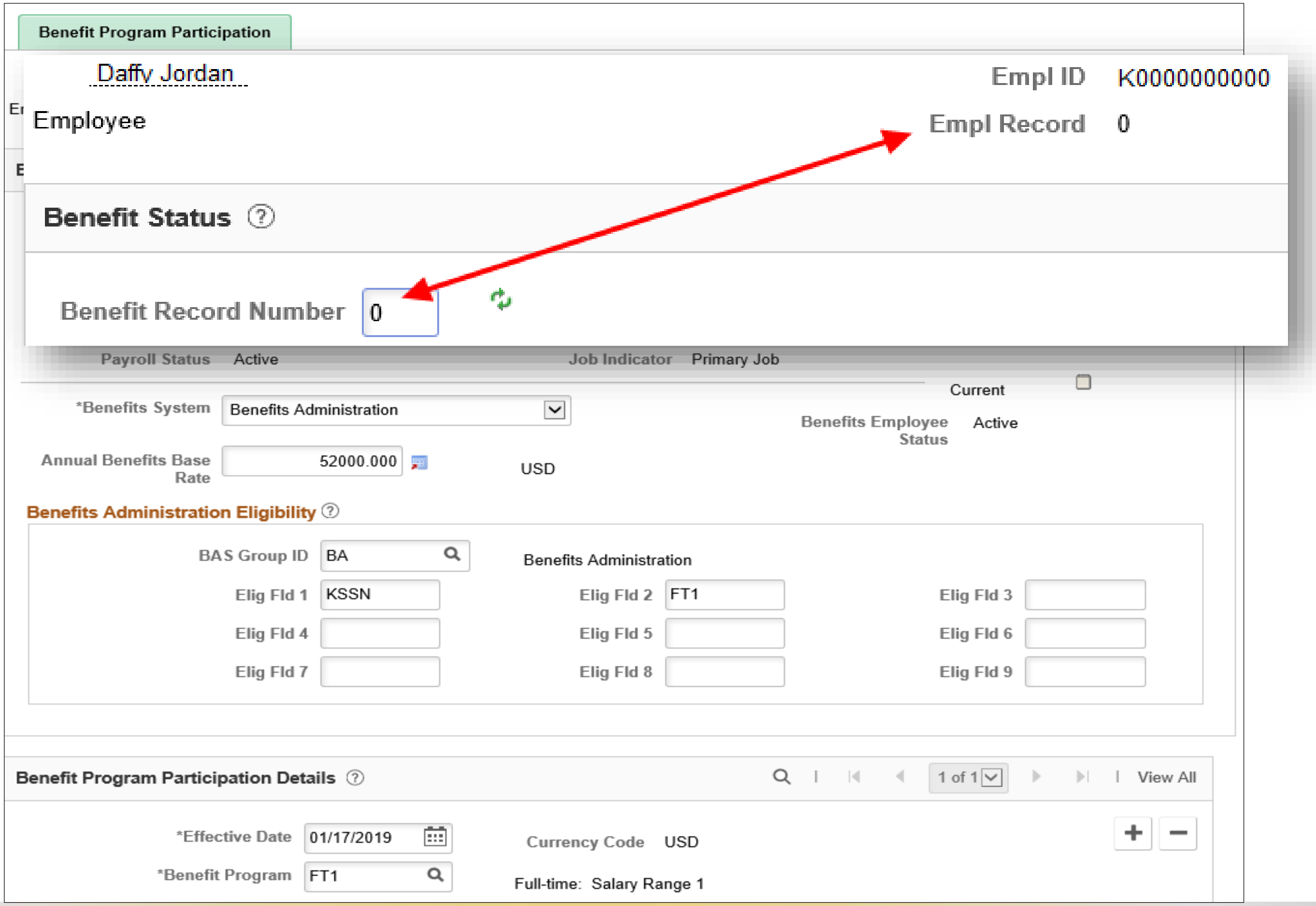
If FTE is:
.90 or greater are full-time for benefits
.50 - .89 are part-time for benefits
.49 or less are not benefits eligible

Benefit programs are:
FT1 – all full-time employees
PT1 – all part-time employees
GEN – not benefits eligible
GRT – used on non-benefits eligible employee record if employee is also active on a benefits eligible position and for those employees working after retirement (KPERS).

# Lesson 1: Overview of Workforce Administration

## Workforce Administration Pages

### Benefit Program Participation



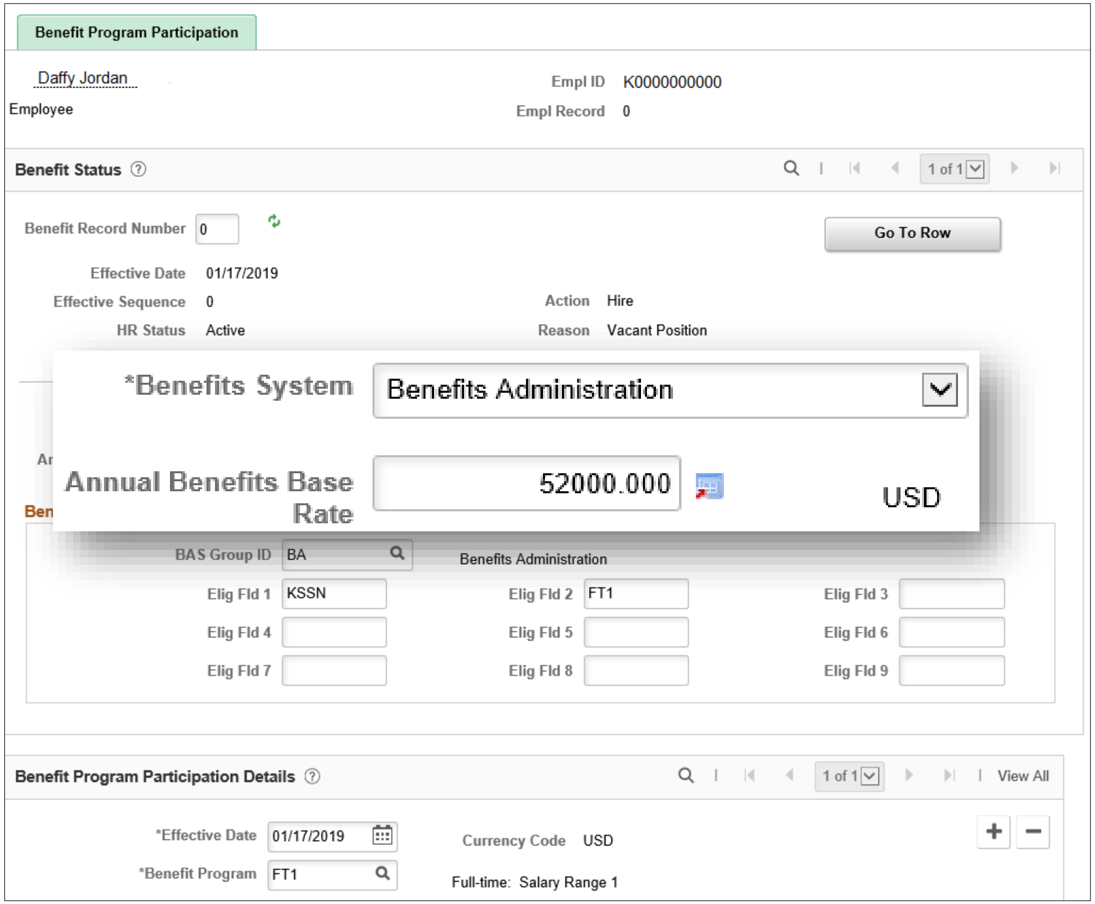

The Benefit Record Number is used when an employee has more than one Empl Record.

The Benefit Record Number indicates which position is responsible for benefits.

The position with the matching Empl Record is responsible for benefits.

# Workforce Administration Pages

## Benefit Program Participation




Benefits System is 'Benefits Administration' for non-Regents agencies.

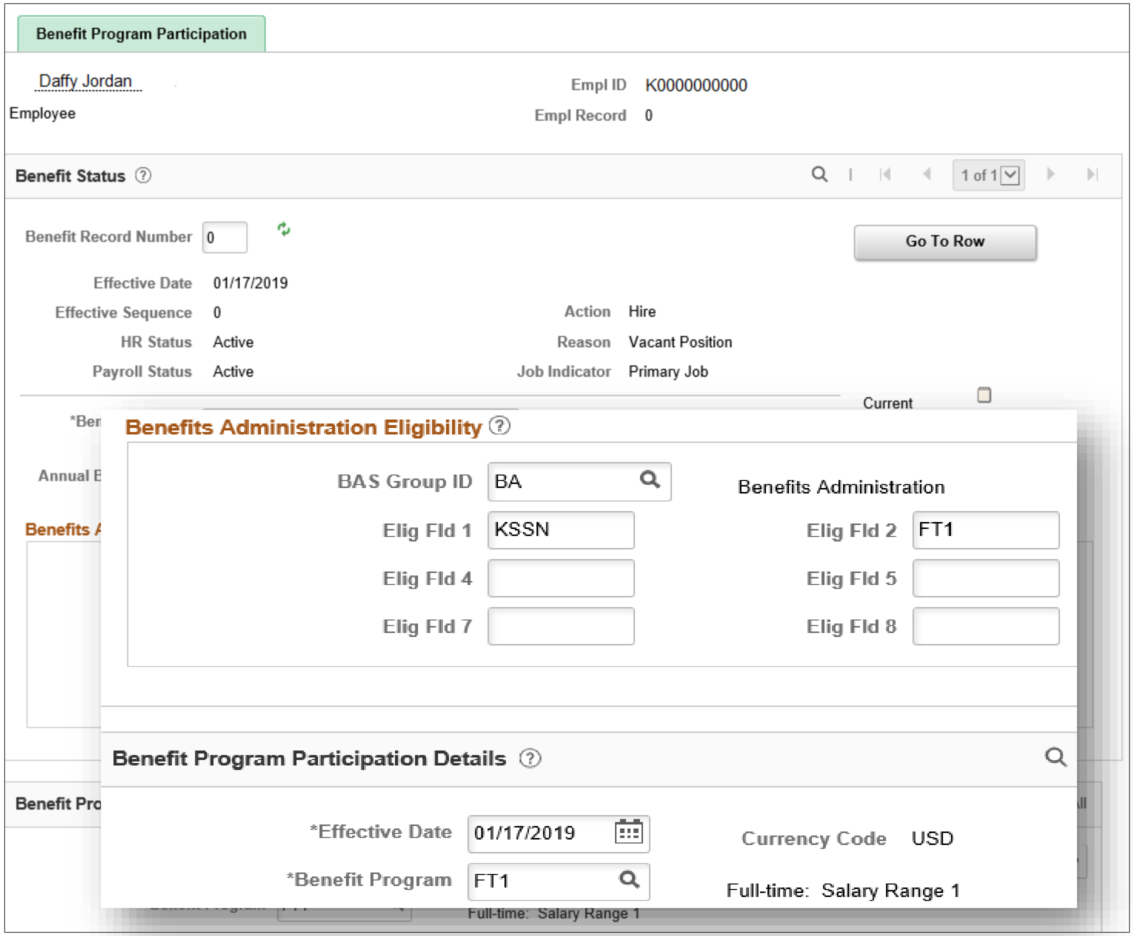
Agencies must manually enter Annual Benefits Base Rate (ABBR) amount, which is usually the same as the Annual Rate on the Compensation page.

ABBR is used to calculate the imputed income amount for employees enrolled in a Group Term Life deduction code. If the ABBR is incorrect, the imputed income amount may be under or over reported as taxable wages on the employee's W2.

For additional information about imputed income, see the Documents section on the SHARP Customer Service web site.

# Workforce Administration Pages

## Benefit Program Participation




<u>Elig Fld 1</u> - Manually enter the code which starts with the EE's home state abbreviation and the 2-digit county of residence. For states other than KS, ZZ can be used for the county code. (For example, MOZZ)

<u>Elig Fld 2</u> - Benefit Program Code

<u>Effective Date</u> – Date the Benefit Program is effective

<u>Benefit Program</u> – Code based on the salary tier described earlier

Update the Benefit Program code, as needed, if the employee's FTE changes or moves to a non-benefits eligible position.

# Workforce Administration Pages

## Employee Review

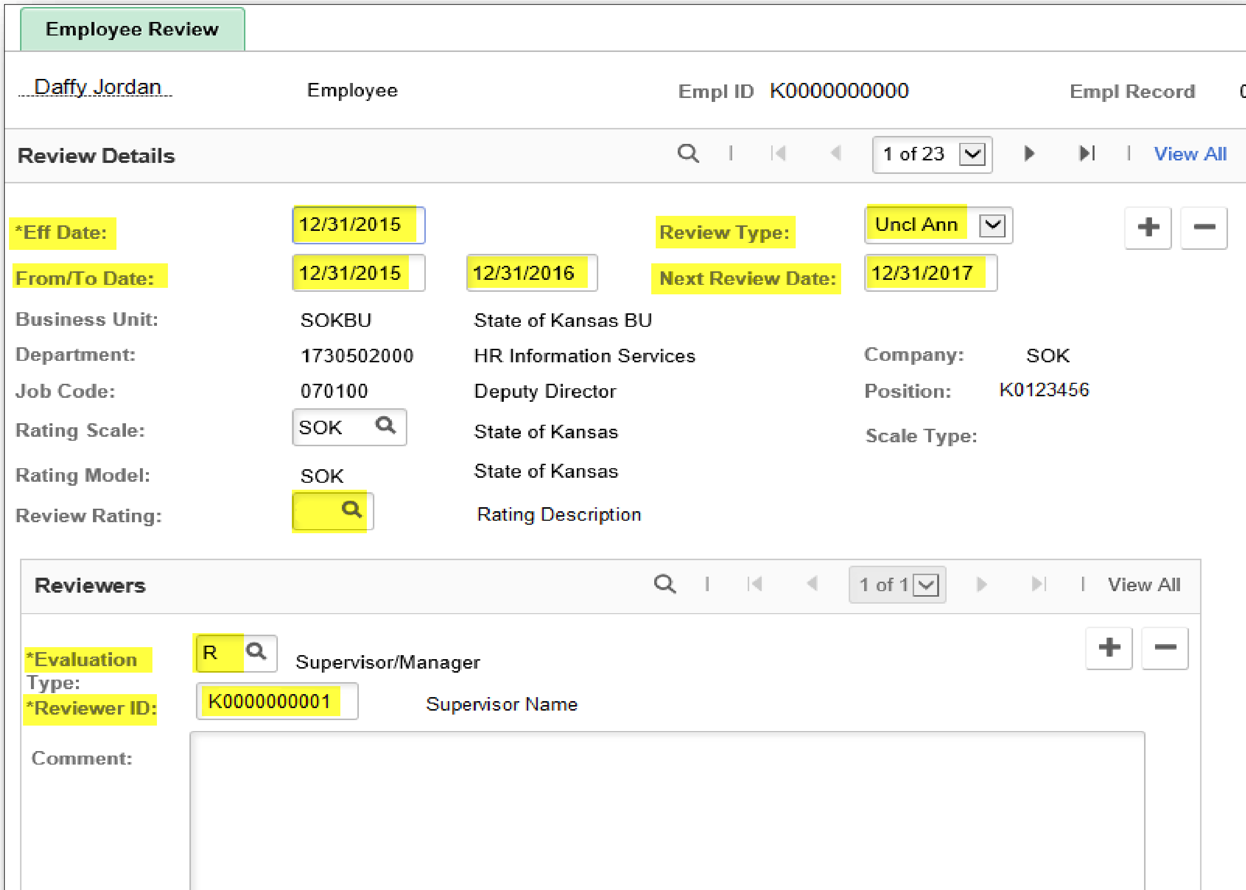
Each new hire and each rehire (other than reemployment or reinstatement) who is employed in a Classified Regular position must serve an Original Probation period of 6 months prior to receiving Permanent status. Periodic performance reviews are then used to inform employees of expected performance outcomes and to assess their effectiveness.

Reviews are required for employees in the Classified service. While not required by regulations, some agencies also like to provide reviews for their Unclassified employees. The possible review types are listed below. Please see Article 7 of the Kansas Administrative Regulations for more details and information on employee evaluations and probationary periods.

<u>Review Types</u>
Classified Probation
Classified Extend Probation
Classified Annual
Classified Special
Governor's Trainee
Training Evaluation
Unclassified Annual
Unclassified Extend Probation
Unclassified Probation
Unclassified Special

# Workforce Administration Pages

## Employee Review




The Effective Date is the date of the review.

Enter the dates of the time period the review covers.

Rating scale is always SOK.

Review Rating: The rating of the employee's performance for the time period. Options are Exceptional, Exceeds Expectations, Meets Expectations, Needs Improvement, and Unsatisfactory.

Evaluation Type: Supervisor/Manager is used most often.

Reviewer ID: The Employee ID of the person performing the review.

Comment: Area to enter comments, if desired.

# Lesson Summary

**Employee Information**

You will use Workforce Administration to set up and maintain employee information. Data entered here is very important to employee pay, Time and Labor, and benefits deductions.

**Actions & Reasons**

SHARP uses Actions and Reasons to define data entry. Often the Actions and Reasons trigger data to insert into other SHARP pages and fields. Most of the Actions and Reasons are based on the Kansas Administrative Regulations. Use the SHARP Action Reason Guide to help determine the appropriate Action and Reason for your data entry.

The SHARP Action Reason Guide is located here.